**Version 6**

# Basic Training Manual

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# 1 Introduction

## A. Introductions -- Trainer and Attendees

## B. Training Outline and Manual

## C. Safe Seven

**Table 1:**

| | Single-User | Multi-DataStation | Central Union | Hosted |
|---|---|---|---|---|
| **Backup** | Librarian | Controller Manager | Person in Charge | Host Staff |
| **Archive** | Librarian | Librarian | Person in Charge | Host Staff*** |
| **System Maintenance** | Librarian | Techs | Techs | Host Staff |
| **Alex Maintenance** | Librarian | Librarian | Person in Charge | Host Staff*** |
| **UPS** | Librarian | Controller Manager | Person in Charge | Host Staff |
| **Security** | Librarian | Librarian | Librarian or Person in Charge | Librarian or Person in Charge |
| **Always Watch Your Screen** | Library Staff | Library Staff | Library Staff | Library Staff |
| **Call Tech Support** | Library Staff | Library Staff | Library Staff | Library Staff |

*** May be changed by Librarian; however, suggest that these be left as set by Host Staff.

### 1. BACK UP, BACK UP, BACKUP

COMPanion recommends that you keep **a minimum of NINE backups** at any given time. Backups are saving complete copies of your Data folder to some external medium be it on CD-ROM, an external hard drive, a flash drive or a file server. You should keep at least one backup per day of the week, plus four previous Fridays. We never discourage customers from keeping additional backups. If you are using the same drive to store all the backups, remember to rename the Data folder to include the date (i.e. 04092009Data, 04102009Data).

You do not need to back up the software. COMPanion can quickly replace the software if your library is current on its subscription. What COMPanion cannot replace is your data — so BACK IT UP!

It is strongly recommended that at least one copy of your data be stored off-site (e.g. take the Friday backup home). Libraries have been burglarized and all computer equipment including the backup discs have been stolen. Libraries have also burned down and the back ups have been instrumental in obtaining a quick and settlement from the insurance company.

**Central Union Systems:** Only one person needs to do the backup.

**Alexandria Controller Systems:** This can only be done by a person with administrative rights to Alexandria Controller, so individual librarians will not be able to perform this function.

**2. Perform standard machine maintenance.**

Ideally, every machine should be scanned each month for viruses and for file damage. Run either Norton Disk Doctor (Macintosh) or Scandisk (PC) on a frequent basis. On Windows, Defragmentation of the hard drive should also be done regularly. Alexandria cannot be expected to run correctly when the operating system or file structure is damaged.

**3. Perform Alexandria maintenance.**

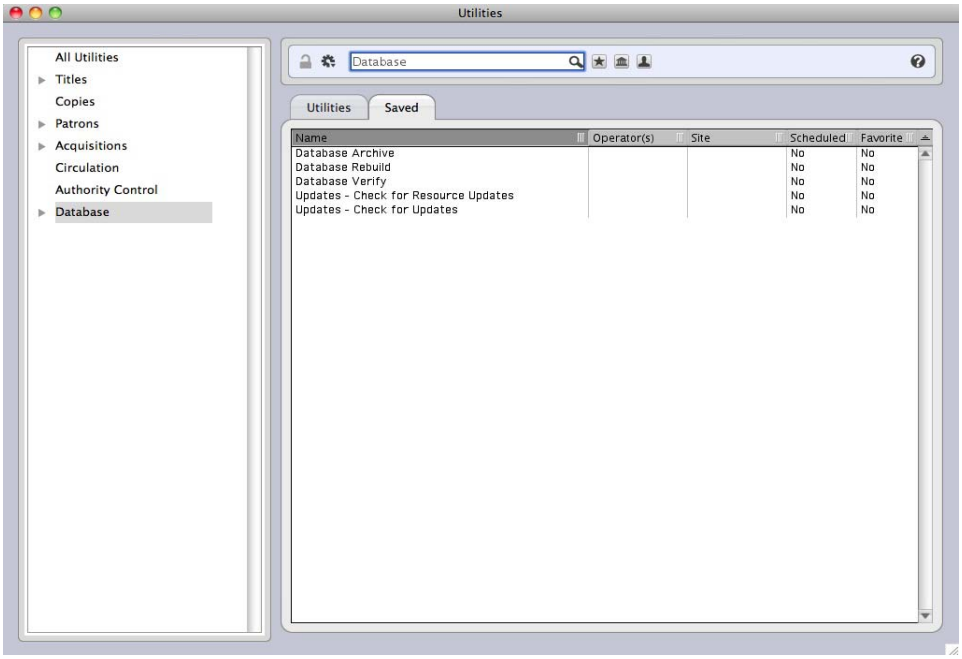
Twice each month you should run **Rebuild** on your Database which can take several hours to run depending on the strength of your machine and the size of your collection. **Rebuild** checks that the indexes used for sorting, browsing, and selecting match the data, that the records are key worded appropriately, and that the status counters are correct. Always archive before running Rebuild or any other major utility or import. Rule of thumb: If it might take longer to correct a problem caused by a bad import or running a utility incorrectly than it will take to run an **Archive**, you should archive your data before performing the **Rebuild** or import.

**Alexandria Controller Systems:** Scheduling a **Rebuild** can only be done by a person with administrative rights to **Alexandria Controller**; however, there is a **Rebuild Now** feature available under **File** on the menu bar.

**Central Union Systems: Rebuild** should be done once a week.

NOTE: Alexandria's Data Station must be running for **Rebuild** to be run.

To set up scheduled Rebuilds:



- Click on **Tools** on the menu bar and select **Utilities**.
- Click on the **Database** in the left pane, then, click on the **Saved** tab in the main (right) pane.
- Click on **Database Rebuild** in the main (right) pane.
- Click on the **Schedule** tab.
- Click on the **Calendar** icon in the **Run next on** field and select a date. It is suggested that you set it for a Friday. Next, set the time of day for a time when no one is likely to be using Alexandria. Change the **Repeat** drop-down menu to **Weekly** and click on **Friday**. Set the **Every** field to the value suggested for your type of system. (Stand-alone -- 4, Central Union -- 1, and Alexandria Controller -- 2).
- If you wish to be notified when a **Rebuild** is run, check the box and fill in your email address in the **Send Email Notification To** field. Check the box for **Restart after Rebuild**. There is no need to check the **Perform Archive Before Running Operation** if, when you schedule your **Archive** in the next section, you schedule it to run about 10 minutes before the **Rebuild**.
- Click on **Save All** in the upper-right corner of the window.

NOTE: You might want to set your **Archive** schedule while you are in **Utilities**.

To set up scheduled Archives:

- Click on **Tools** on the menu bar and select **Utilities**.
- Click on the **Database** in the left pane, then, click on the **Saved** tab in the main (right) pane.
- Click on **Database Archive** in the main (right) pane.
- Click on the **Schedule** tab.
- Click on the **Calendar** icon in the **Run next on** field and select a date. It is suggested that you set it for a Friday. Next, set the time of day for a time when no one is likely to be using Alexandria AND a time that is *at least 10 minutes before* your **Rebuild** is scheduled to run. Change the **Repeat** drop-down menu to **Daily**.
- If you wish to be notified when an **Archive** is run, check the box and fill in your email address in the **Send Email Notification To** field. Do ***not*** check the box for **Perform Archive Before Running Operation**.
- Click on **Save All** in the upper-right corner of the window and close the **Utilities** window.
- Go to **Edit** on the menu bar and select **System Preferences**.
- In the **System Administration** section, click on **Site Information.**
- Click on the **Scheduled Events** tab and set the number of **Archives to Keep** to at least 10.
- Click on **Save** in the upper-right corner of the window.

To run a Rebuild immediately.

- Go to **File** on the menu bar.
- Select **Rebuild Now**.
- Select both **Run an Archive before rebuilding** and **Restart after a successful rebuild**.

**Rebuild** looks at every record and pointer in Alexandria's database. If it encounters any problems in the record, Alexandria will do everything possible to correct the problems; however, if the problems cannot be resolved, the record is deleted. The following procedures are recommended in conjunction with **Rebuild**:

At the end of the day on which Rebuild will be run:

- Click on the **Special** tab in the middle of the **Circulation** window.
- Click on the **System Info** subtab.
- Write down the first four figures (number of patrons, titles, copies, and transactions) that are shown in the left pane of the tab.
- Go home.

The first thing in the morning on the first work day after Rebuild has been run:

- Click on the **Special** tab in the middle of the **Circulation** window.
- Click on the **System Info** subtab.
- If the figures are the same, no problems were found.
- If the figures are different, there were problems found in your database that could not be repaired. Call Alexandria Tech Support (1-800-347-4942) and tell them and they will be able to help you restore from an Archive and bring your data up to date so that you have all your records.

**4. Have a UPS (Uninterruptable Power Supply) or battery backup on the Data Station and test it.**

Alexandria 6 uses TCP/IP technology for its communication and operation procedures. The server program, called the Data Station, must be running for any clients, also known as workstations, to search, circulate, run reports, etc. For Alexandria, there is one type of workstation — Alexandria **Librarian Workstations**. If the Data Station program is not running, NO ONE can view or change the data. (In case there is an extended power failure over the weekend, it is essential that you back up your data before leaving on Friday.)

In addition, the Data Station does all the work with the data; the clients simply ask the Data Station to perform various procedures. As such, the Data Station should be on the best machine available.

Since the Data Station does all the work, it has the ability to prioritize requests from the clients. Some procedures will be postponed temporarily while other more pressing procedures are addressed. The Data Station will, therefore, hold some things in memory to take care of when it is not so busy. If there is an interruption of power, your data can become corrupt if you do not have a UPS to protect it.

A UPS is an Uninterruptable Power Supply and is only meant to give you enough time to get to the Data Station, quit Alexandria, and shut down the machine appropriately. Do not connect unnecessary machines or appliances to a UPS since they will drain critical energy from the UPS.

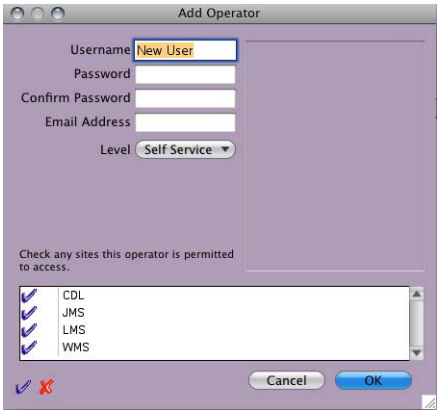
**5. Enable Security.**

The Alexandria program comes without any security protocols activated. As such, unless you install an additional security program or enable security within Alexandria, anyone can launch Alexandria and have full privileges to add, remove, and change patrons, items, orders, budgets, vendors, subscriptions or routes or to check items in and out, assign and forgive fines, etc. It is strongly recommended that you enable security within your Alexandria preferences.

In addition, if your Data Station is publicly accessible and without some form of system security, someone could delete, move, or rename your data file. It is, therefore, strongly recommended that you install and enable a system security program. Some operating systems come with such security built in.

To enable security:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Operators** in the **System Administration** category.
- Click on the **Add** (+) icon at the bottom-left of the window.




- Fill in the **Username** and **Password.** Fill the same password in the confirm **Password** field. Enter the **Email Address** of the user.
- Set the **Group** of security using the drop-down menu. The first person entered must be the **Library Administrator** or **District Administrator** level person. More than one person may be given these levels.
- If you are in a Central Union system, check the **Site ID Codes** for which the operator will be granted privileges.
- Click on **OK**.
- Check the box for **Require User Login**.
- Click on **Save** on the **System Preferences** window, then, close the **System Preferences** window.

To customize the privileges of a security group:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Security** in the **System Administration** category.
- Click on the **Security** tab.
- Click on the **Security Group** you wish to customize.
- Using the drop-down menus on all **Section** tabs, consider the options given and set privileges as you wish for operators with the security level.
- When finished, click on **Save** in the upper-right corner of the window.

**6. Watch your screen at all times.**

Alexandria offers audio clues to alert you to special circulation and program messages, this function isn't helpful if, for some reason, the computer sound is not working. Alexandria is also streamlined for certain procedures based upon assumptions that are often made in the library environment. Those assumptions may differ from what you desire. ALWAYS, ALWAYS, ALWAYS watch your screen. Fully read each message and ensure that what you thought you did was exactly what the program claims you did.

**7. When in doubt, contact Technical Support.**

If your library is current on its support subscription, when you have a problem or a question, please contact Technical Support. You may call Technical Support 24 hours a day, 7 days a week, 365 (or 366) days of the year. Phone number: 1-800-347-4942.

During the busy time of the year (beginning of school, beginning of the calendar year, and inventory season), you may be asked to leave a voice message. Tech support will contact you as soon as they are available. The goal is to return these calls in less than an hour.

You can email Technical Support directly from Alexandria 6.0.1. Emailing from the program not only sends your message or question to Technical Support, but also informs them about your machine, its hardware, memory, your data, and the version of Alexandria you are running.

To email Technical Support:

- Click on the **Support** tab on the middle-right side of the **Circulation** window.
- Click on the **Email** subtab.
- Type the subject and the desired message in the fields provided on the **Email Tech Support** tab. If this isn't the current pane, click on the **Letter** icon to bring this pane to the front.
- Click on **Send** to send the message.

NOTE: You cannot email Technical Support if you do not have a return email specified in your **Site Information Preferences** and if you do not have an Internet connection.

# D. Alexandria Help

Alexandria provides built in **Help** documents. These can be accessed in either of two ways.

In the upper-right corner of each Alexandria module window is a ? in a circle. This is the **Help** icon. If you click on this icon, it will open the help document associated with that window from the Alexandria Wiki.

The second method is to view an index of all the help documents at one time. The **Alexandria Help Index** gives a list of the help documents grouped in categories. If you would like to view the help documents in an alphabetical listing, there is a link on the **Alexandria Help Index** that will take you to a help index that is in alphabetical order.

To view the Help Index:

- Click on **Help** on the menu bar.
- Select **Alexandria Help**.
- Click on the desired **Help** document.

# E. ListServs and Tech Notes

### 1. Alex-Net

Alex-Net is a friendly forum that allows Alexandria customers to post questions, problems, and product ideas. Posted messages are then sent by email to the members of Alex-Net. This forum enables users to help other users, share tips and tricks, or ask and answer questions about Alexandria.

To subscribe to Alex-Net:

- Go to Alexandria's website, **http://www.goalexandria.com**
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Select **Alex-Net & Other ListServs**.
- Check **Alex-Net** and fill in the form.
- Click **Submit**.

### 2. Tip of the Week

Tip of the Week is a part of the Alexandria web page that features a new tip for using Alexandria each week. The archives for Tip of the Week are a collection of tips for running Alexandria more smoothly. These tricks of the trade are written by the Alexandria staff librarians. You may view them every week both via email or on our website.

To receive the weekly Tip of the Week emails:

- Go to Alexandria's website, **http://www.goalexandria.com**
- Click on **Support** at the top of the web page.

- Select **Librarian's Corner** from the **Support** drop-down menu.
- Select **Alex-Net & Other ListServs**.
- Check **Tip of the Week** and fill in the form.
- Click **Submit**.

To view the current and past Tip of the Week documents:

- Go to Alexandria's website, **http://www.goalexandria.com**
- Click on **Support** at the top of the web page.
- Select **Librarian's Corner** from the **Support** drop-down menu.
- Click on **Tip of the Week**.
- The current Tip of the Week is in the main frame of the window.
- To view previous tips, click on **TOTW by Subject** in the **Tip Archive** box on the right side of the window.
- Click on the desired **Subject**.
- Click on the desired tip in the list.

### 3. Tech Notes

Our Tech Support personnel have written many excellent Tech Support documents for your benefit. These can be found on our Alexandria website.

To view Tech Notes:

- Go to **http://www.goalexandria.com**
- Click on **Tech Notes** under **User Favorites** on the left side of the window.
- Select the appropriate **Tech Notes** group.
- Select the desired **Tech Note** document from the list given.

# 2 Circulation

## A. Menu Bar

## B. Circulation Window

## C. Check Out

1. **Check out** *A Child Called "It"* **(3187) to Camille Arnold (1003).**

2. **Check out** *Across a Dark and Wild Sea* **(3064) and** *The Complete Dog Book for Kids* **(3129) to Rebecca Eckhoff (1032).**

   To check out an item:

   - Make sure the mode is set to **Check Out**.
   - ALWAYS bring up the patron first (even though, in real life, the patrons usually hand you their items before they give you their library cards or tell you their names).
   - Set the **Override** date, if necessary.
   - Type or scan the barcodes of the items to check out.
   - Respond to any **Circulation Alert** messages.

- When typing barcodes rather than scanning barcodes, always follow the barcode with an **<enter>**.

- If using an override date, clear it by typing a period (**.**) and pressing **<enter>**.

## D. Override Dates

**3. Check out** *Azerbaijan* **(3430) and** *The American Spirit: Meeting the Challenge of September 11* **(3207) to Jami Stark (1009) until the end of the school year. (Remember to clear override date when no longer needed.)**

To set an override date:

- First, enter the desired mode.

- Type period (**.**), then the desired date in **MMDDYY** format and press **<enter>**.

To clear an override date:

- Type a period (**.**) and press **<enter>**.

## E. Circulation Messages

**4. Check out** *The Last Book of the Universe* **(3191) and** *B. Franklin, Printer* **(3027) to Marijane Lou Coots (1036). Choose** Yes **to check out the second item. Note the** Transaction Log.

**5. Check out 3520, 3523, and 3072 to Joseph Todd Berol (1014). (Choose** Override **and then choose** Cancel**.)**

## F. Bookdrop Mode (B)

**6. Check in 3129.**

**7. Check in 3013.**

**8. Check in 3085.**

**9. Check in 3193.**

**10. Check in 3430.**

To check in a single item:

- In the **Command Line**, type **B** and, then, scan or type the barcode of the item to be returned. (This will check the item in without changing the **Circulation** mode.)

To check in multiple items:

- To enter **Bookdrop** mode, there are three methods:

In the **Command Line**, type **B** and press **<enter>**.

OR

Choose **Start Bookdrop** from the **Circulation Actions** (gear) menu.

OR

Click on the drop-down menu next to the **Command Line** field and select **Bookdrop**.

- Set the **Override** date for the date the copies were or should be listed as returned if different from today's date.
- Type or scan the barcodes of the copies to check in.
- Respond to any **Circulation Alert** messages that appear.
- When finished using the **Override** date, clear it by typing a period (**.**) and pressing **<enter>**.

## NOTES:

- If patron barcodes ar ethe same as item barcodes, you must always put a **P** in the **Command Line** before scanning the patron barcode. (It is recommended that you change either the patron barcodes or the item barcodes to remove the conflict.)

- When typing barcodes rather than scanning barcodes, always follow the barcode with an **<enter>**.

## Let's Practice

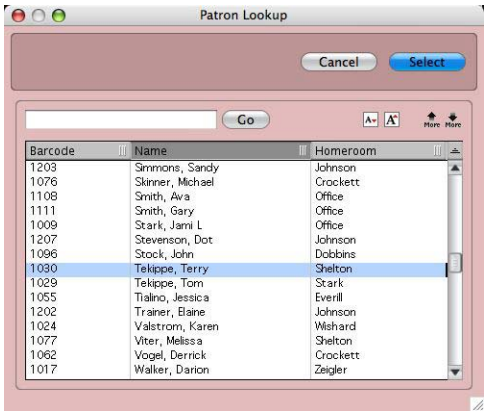
- Check out the item, *Above and Beyond* (3051) to Michelle Sciera (1026).

- Check out the item, *The Life of a Nazi Soldier* (3205) to Luann Larimer (1033).

- Check out the items, *Aladdin* (3151), *The Adventures of Tom Sawyer* (3087) and *The Autobiography of Meatball Finklestein* (3426), to Derrick Pichon (1006).

# 3 More Circulation

## A. Locate a Patron by Last Name (L)



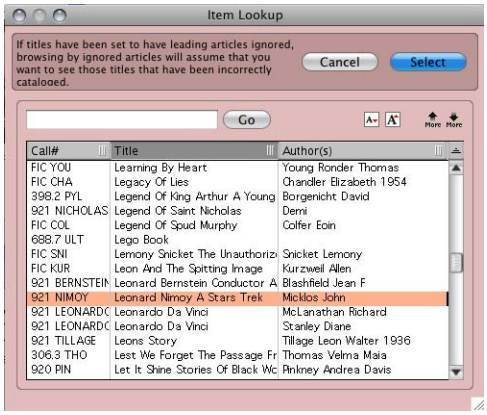

**NOTE:** Always put a space between the **L** and the text for your search. Although the space is not required, there are other commands such as **LM** (**Lost Mode**) and **LF** (**Locate by First Name**) which will cause confusion -- if you type LFRAN, are you searching for a first name beginning with RAN or a last name beginning with FRAN? Alexandria will consider it to be the **LF** command instead of a last name search. So, it is recommended that you use the <space> between the command and the text.

**1. Locate Tom Tekippe and make him the Current Patron.**

To look up a patron by name:

- Either click on the **Command Help** tab and choose **Locate Patron** or type **L**.
- Type as much of the patron's last name as needed and press **<enter>**.
- Click on the correct name to highlight it and then click **Select** or double click on the correct name.

## B. Locate an Item by Title (T)


Item Lookup
If titles have been set to have leading articles ignored, browsing by ignored articles will assume that you want to see those titles that have been incorrectly cataloged.
Cancel
Select
Go
More
More
Call#
Title
Author(s)
FIC YOU Learning By Heart Young Ronder Thomas
FIC CHA Legacy Of Lies Chandler Elizabeth 1954
398.2 PYL Legend Of King Arthur A Young Borgenicht David
921 NICHOLAS Legend Of Saint Nicholas Demi
FIC COL Legend Of Spud Murphy Colfer Eoin
688.7 ULT Lego Book
FIC SNI Lemony Snicket The Unauthoriz Snicket Lemony
FIC KUR Leon And The Spitting Image Kurzweil Allen
921 BERNSTEIN Leonard Bernstein Conductor A Blashfield Jean F
921 NIMOY Leonard Nimoy A Stars Trek Micklos John
921 LEONARDO Leonardo Da Vinci McLanathan Richard
921 LEONARDO Leonardo Da Vinci Stanley Diane
921 TILLAGE Leons Story Tillage Leon Walter 1936
306.3 THO Lest We Forget The Passage Fr Thomas Velma Maia
920 PIN Let It Shine Stories Of Black Wc Pinkney Andrea Davis

2. **Locate the title,** *Leonard Nimoy : a Star's Trek***.**

   To look up an item by title:

   - Click on the **Command Help** tab and choose **Find Title** or type **T**.
   - Type the first part of the title and press **<enter>**.
   - Click on the correct title to highlight it and then click on **Select** or double click on the correct title.

## C. Place a Hold on a Title (H)

3. **Place a hold on** *Leonard Nimoy : A Star's Trek* **for Tom.**

   To place a hold:

   - Scan or type in the patron's barcode to make that person the **Current Patron**.
   - Type the command, **T**, and type enough of the title to take you to the correct part of the title list.
   - Select the title from the list. Double click on the title or click on **Select** to make the selected title the **Current Item**.
   - Type **H** (for **Hold**) and **=** (for the **Current Item**) (e.g. H=) and press **<enter>**. You may also type **H** and the barcode of the item (e.g. H1234).

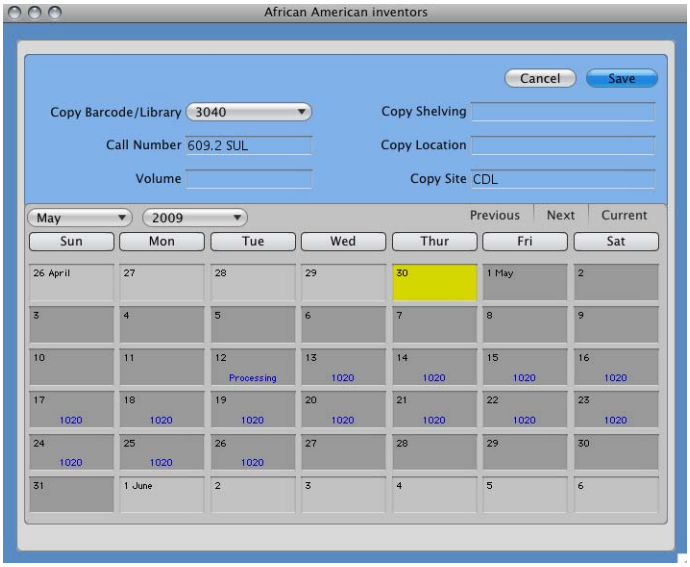
   To place multiple holds for a single patron:

   - First, scan or type the patron's barcode to make that patron the **Current Patron**.
   - Next, type the **H** command and press **<enter>** in the command line. This changes the mode to **Hold** mode.
   - Now type **T** and the title. Select the appropriate title.
   - Type **=** and press **<enter>**. A hold will be placed on that item record.

NOTE: Instead of the title search and the **H=** command, you may type **H** {barcode}.

NOTE: For Central Union customers, the **HC** commands allows you to place a hold on a particular copy. This ensures the hold is from your collection.

## D. Place a Reservation on a Specific Copy (G).




4. **Create a reservation for Kerri Dobbins for the item,** *African American Inventors* **(3040) for the second full week of next month.**

   To create a forward reservation:

   - Scan or type the patron's barcode to make the person the **Current Patron**.
   - Type **G** (think -- "Get it later")and type or scan the barcode of the item on which to place the reservation.
   - Select the desired **Month** and **Year**.
   - **Click**, **hold** and **drag** to highlight the dates for the patron's reservation for that item.
   - Click **Save** when finished.

## E. Renewing an Item (R, RA and Renewal Icon)

5. **Renew** *The American Spirit: Meeting the Challenge of September 11* **(3207) by typing** R **and the barcode.**

   To renew an item:

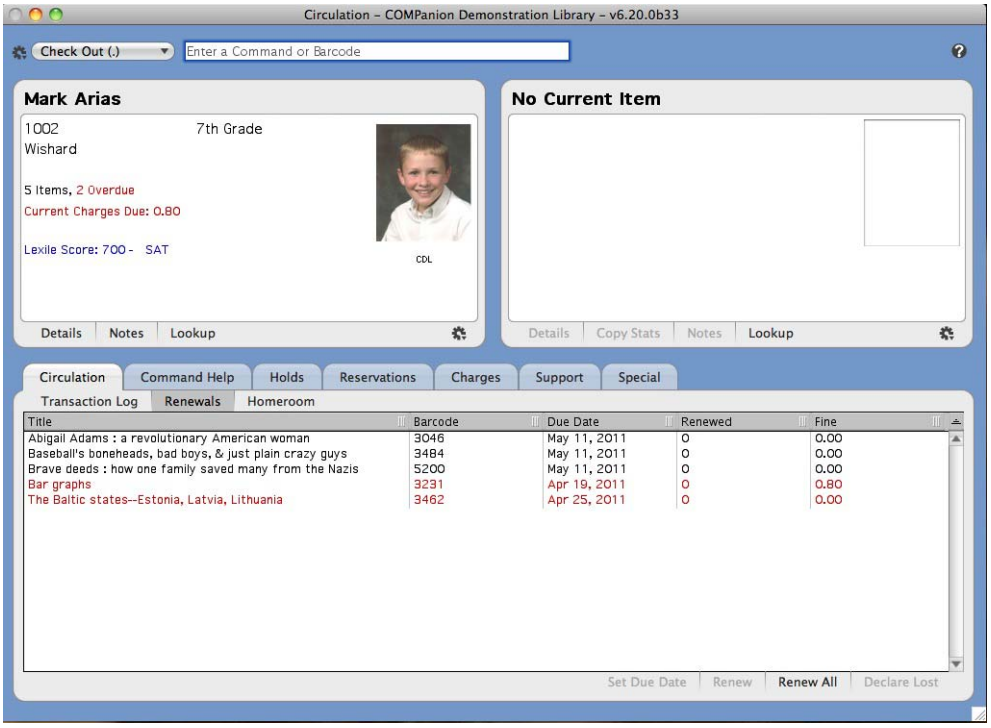
   - If the item is present, simply type **R** for renew, then type or scan the item barcode number.

6. **In** Renewal **mode, renew items 3190 and 3167.**

   To renew multiple items:

   - Type **R** and press **<enter>** or select **Renew Patron Items** from the **Circulation** menu.
   - Scan the barcodes of the items to be renewed.
   - When you are finished renewing, type a period (**.**) and press **<enter>** to return to **Check Out** mode.

7. **Mark Arias would like to renew three of his books, but did not bring them with him. Renew** *Bar Graphs*, *Baseball's Boneheads, Bad Boys, and Just Plain Crazy Guys*, **and** *The Baltic States: Estonia, Latvia, Lithuania* **using the** Renewal **window.**




   To renew items not present:

   - Enter the patron's barcode number.
   - Click on the **Renewal** subtab on the **Circulation** tab.
   - Select the titles to be renewed. (NOTE: You may select individual titles by holding down the **<Cmd>** key (Macintosh) or **<Ctrl>** key (Windows) and clicking on the desired titles.)
   - Click on **Renew** at the bottom of the window.
   - Respond to any circulation messages that appear.

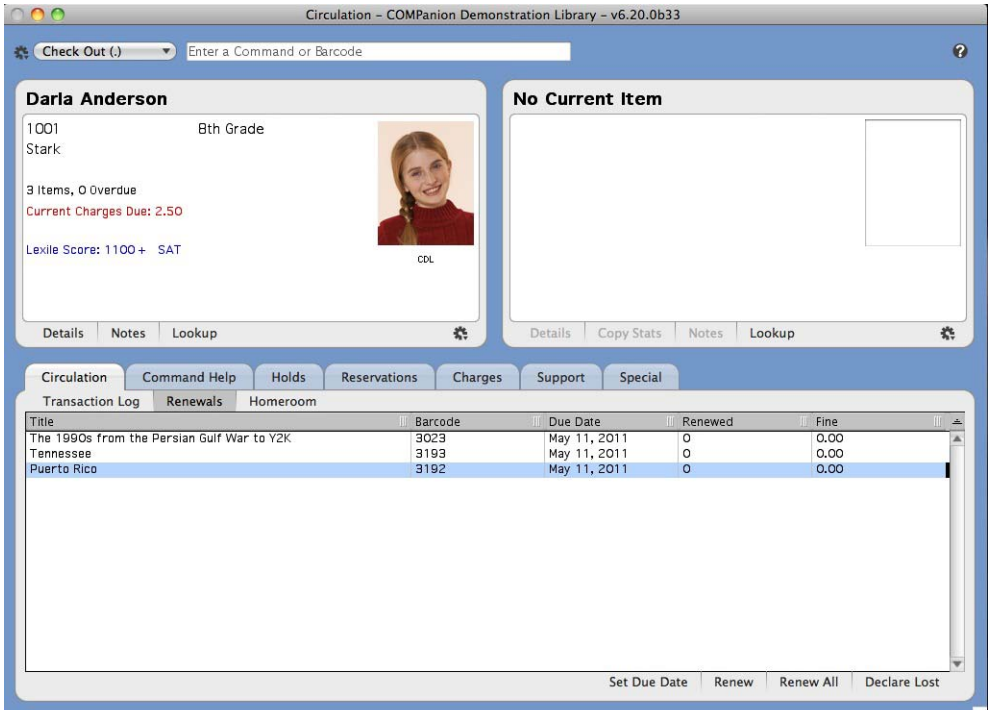
8. **Todd Malta (1013) would like to renew all of his books, but did not bring them with him. renew them using the** RA **command.**

To renew all items for a patron:

- Make the patron the **Current Patron.**
- Type **RA** and press **<enter>**. This will automatically renew all items checked out to that patron.
- Respond to any circulation messages that appear.

**NOTE:** these same functions may be accomplished using the **Renewal** window. Simply click on **Renewals** on the **Circulation** tab, then use the buttons at the bottom of the pane.

# F. Declaring a Copy Lost




**9. Darla Anderson (1001) has lost the book,** *Puerto Rico*. **Declare it lost.**

To declare an item lost:

- In **Check Out** mode, scan or type the barcode of the patron with the lost item(s). If the barcode was typed, press **<enter>**.
- Click on the **Renewal** subtab on the **Circulation** tab to open the **Renewal** pane.
- Highlight the item(s) to be marked lost.
- Click on the **Declare Lost** button.
- If you are sure you want to make the selected item lost, click **Yes** on the dialog window that opens.
- Complete the process in the **Charges** window on which you may forgive a portion or all of the charge, add an additional charge, take a payment, and print a receipt as desired.

This will automatically check the item out to **Patron** barcode **1**, the **Lost Copies** patron, and mark the item as lost.

Notice the **Transaction Log** shows the item was lost and how much the patron was charged.

When declaring a copy lost by a specific patron, DO NOT check the item in first.

Lost items are not automatically deleted. They show as **Lost** in the **Search Results** (if the only copy) and **Lost** in the **Item Details** unless you set your **Researcher System Preferences** on the **Auto-Hide** tab.

When you are ready to permanently remove lost copies, use the **Remove Lost Copies** utility found in **Copy Utilities**.

---

# NOTES:

- When searching for a patron or item, you only need to type as much of the title or last name to get to the general area on the **Browse** window (e.g. And for Anderson). Use the two **More** arrow buttons to show you more selections prior to or after your search entry.

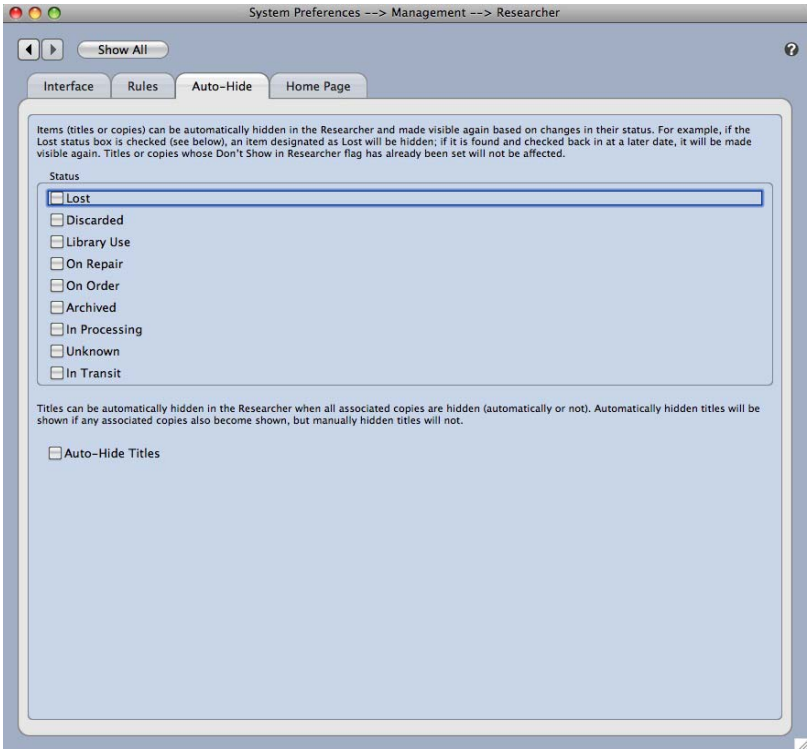
- When using the **T** command, if you type in a leading article or leading punctuation, Alexandria will search using that article and will not find the title if the **# of Non-filing Characters** field is set to ignore those characters. To find the title, it might be necessary to try the search with *and* without the leading article or punctuation. Leading characters in title tags other than the 245 tag are ignored based upon MARC record standards. See **Alexandria Help -- Leading Articles** for more information.

- In-stock holds are removed when the copy is checked out. Checking out a different copy of the same title does not remove the in-stock hold.

- For Central Union customers, the **HC** command allows you to place a hold on a particular copy. This ensures the hold is from your collection.

- Using the **Lost Copies** patron tags copies for removal later. This feature enables you to account at the year's end for how many copies were lost and the value of those items.

- You may set your preferences to automatically hide lost and discarded items.


System Preferences --> Management --> Researcher
Show All
Interface
Rules
Auto-Hide
Home Page
Items (titles or copies) can be automatically hidden in the Researcher and made visible again based on changes in their status. For example, if the Lost status box is checked (see below), an item designated as Lost will be hidden; if it is found and checked back in at a later date, it will be made visible again. Titles or copies whose Don't Show in Researcher flag has already been set will not be affected.
Status
Lost
Discarded
Library Use
On Repair
On Order
Archived
In Processing
Unknown
In Transit
Titles can be automatically hidden in the Researcher when all associated copies are hidden (automatically or not). Automatically hidden titles will be shown if any associated copies also become shown, but manually hidden titles will not.
Auto-Hide Titles

  - Go to **Edit** on the menu bar and select **System Preferences**.
  - Click on **Researcher** in the **Management** section.
  - Click on the **Auto-Hide** tab.
  - Click on any of the types of copy status that you do not want to show in the **Researcher**.
  - Click on **Save**.

# Let's Practice

- Paul Rockwell forgot his library card. Locate his record and check out the item, *American Heroes* (3199), to him.
- Mitchell Miller (1034) wants to know if you have the item, *Basketball*. Check to see if you have that item. and check it out to Mitchell.
- Bill Shelton (1004) called you and really wants the item, *The Colony* (3520). Place a hold on that item for Bill.
- Michelle Sciera's (1026) best friend just checked out the item, *B. Franklin, Printer.* Michelle wants it after her friend is finished. Place a hold on that item for Michelle.
- Keri Dobbins (1020) is teaching a unit on European history next month. She always uses the item, *Brave Deeds : How One Family Saved Many from the Nazis* (3252). She wants to reserve it so that she is sure it will be available for the first full week next month.
- Renew *Memories of Sun* (3089).

# 4 Special Circulation

## A. Statistics Mode (Y and Y@)

1. **A class has just finished doing research in the library during which many books were used "in house." You want to record usage of these books not only to increase your circulation statistics, but to track usage of these items —** *Bury Me Not in the Land of Slaves* **(3800),** *Bound for the North Star* **(3713), and** *Harriet Tubman* **(5473).** *Growing Up in Slavery* **(5407) was used 8 times.**

   To use Statistics mode:

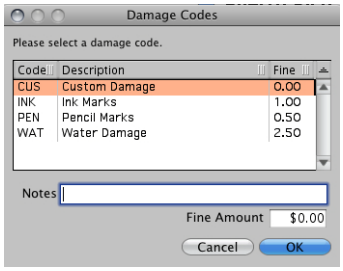
   - Type **Y** and press **<enter>**.
   - Scan the barcodes of the item(s).
   - When finished, type a period (**.**) and press **<enter>**.

   To record multiple statistics for items:

   - Type **Y@** and the **number** of usages to record and press **<enter>**.
   - Scan the barcodes of the item(s).
   - When finished, type a period (**.**) and press **<enter>**.

## B. Charging Damages (DL) and Fees (F)

2. **Maryjane Lou Coots returned** *B. Franklin, Printer* **(3027) with slight water damage. Charge her $3 for the damage.**




   To add a new damage code:

   - Go to **Edit** on the menu bar and select **System Preferences**.
   - Click on **Rules** in the **Circulation** category and then click on the **Damage Codes** tab.
   - Click on the **Add** (+) icon in the bottom-left corner of the window.
   - Enter a **Damage Code** (this must be very short), a **Description**, and a **Fine** amount.

- Click on **OK**, then click on **Save**.

To edit a damage code:

- Double click on the **Damage Code** you wish to edit.
- Make any changes needed.
- Click on **OK**, then click on **Save**.

To charge for damage:

- First, make the patron current by typing or scanning the patron's barcode or using the **L** command to locate the patron by last name.
- Bookdrop the item by scanning the barcode or, if the item has already been checked in, type **X** and scan the barcode. You must have both the item and patron showing in the **Circulation** window.
- Type the **DL** command either with the appropriate **Damage Code** or without and press **<enter>**. If you have typed the **DL** command and a **Damage Code** (i.e **DL INK**), then the patron will be charged the assigned amount. If you only type **DL** and press **<enter>**, you may then select one of the pre-defined **Damage Codes** or select **Custom Damage**.
- If you select **Custom Damage**, then enter a short description of the damage in the Notes field and the amount in the **Fine Amount** field. Lastly, click on **OK**.

**3. Terry Tekippe lost his library card. Charge him $1.00.**

To charge a fee using the **F** command:

- First, make the patron current by typing or scanning the patron's barcode or using the L command to locate the patron by last name.
- Type the **F** command (for Fee), then the fee amount, and, lastly, the description of the fee. Press **<enter>** when finished. (i.e. **F** 1 Lost library card)

  NOTE: Alexandria saves you key strokes because it recognizes a non-decimal number to represent a dollar amount (e.g. 3 for $3.00) and single decimal figures are converted appropriately (e.g. 3.5 is recognized as $3.50).

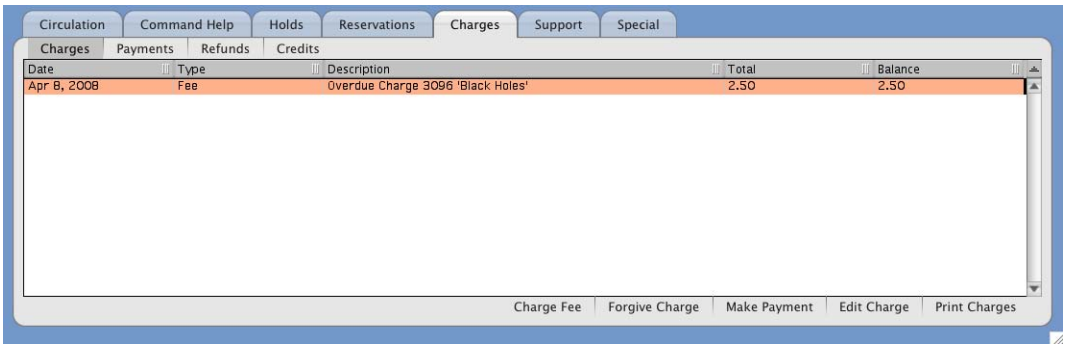
To charge a fee using the Charges tab.

- The patron being charged must be the **Current Patron**.
- Click on the **Charges** tab, then click on the **Charge Fee** button at the bottom-right corner of the window.
- Fill in the **Fee Comment** and **Fee Amount** fields. If a payment is being made or a credit is being applied, fill in the **Payment** and/or **From Credit** fields.
- Click on **OK**, **Cancel**, or **Charge Fee**/**Print Receipt** at the bottom of the window.

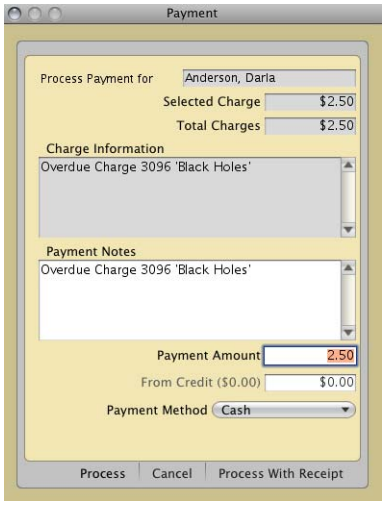
To pay or forgive a fee or fine:

- First, make the patron current by typing or scanning the patron's barcode or using the **L** command to find the patron locate the patron by last name.

- Click on the **Charges** tab and make certain that the **Charges** pane is the one being viewed.
- Highlight the fee or fine to pay or forgive.
- Click on the appropriate button — **Forgive Charge** or **Make Payment**.




- If you click on **Make Payment**, enter the amount the patron is paying, select method of payment, etc.

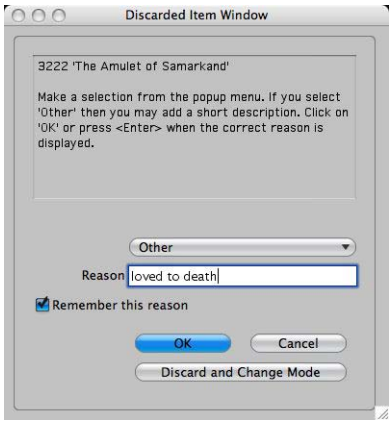



- Click on **Process with Receipt** or **Process** (to process without printing a receipt).

To add a note to an item record:

- The item copy must be the **Current Item**.
- Type ++ and then the comment (i.e. ++ Ink writing on p. 75).
- Press **<enter>**.

## C. Discard a Copy (2)


Discarded Item Window
3222 'The Amulet of Samarkand'
Make a selection from the popup menu. If you select 'Other' then you may add a short description. Click on 'OK' or press <Enter> when the correct reason is displayed.
Other
Reason loved to death
Remember this reason
OK
Cancel
Discard and Change Mode

4. **You have spent a busy day weeding**. **The following books are out dated:** *History and the History Teacher* **(3507) and** *Discipline and the Classroom Teacher* **(3496). You also found several items that have been worn out through such heavy use that they must be discarded —** *Bill Nye's Great Big Dinosaur Dig* **(3604),** *Harry Potter and the Chamber of Secrets* **(5480), and** *Famous Bears and Friends* **(4877).**

   To discard an item:

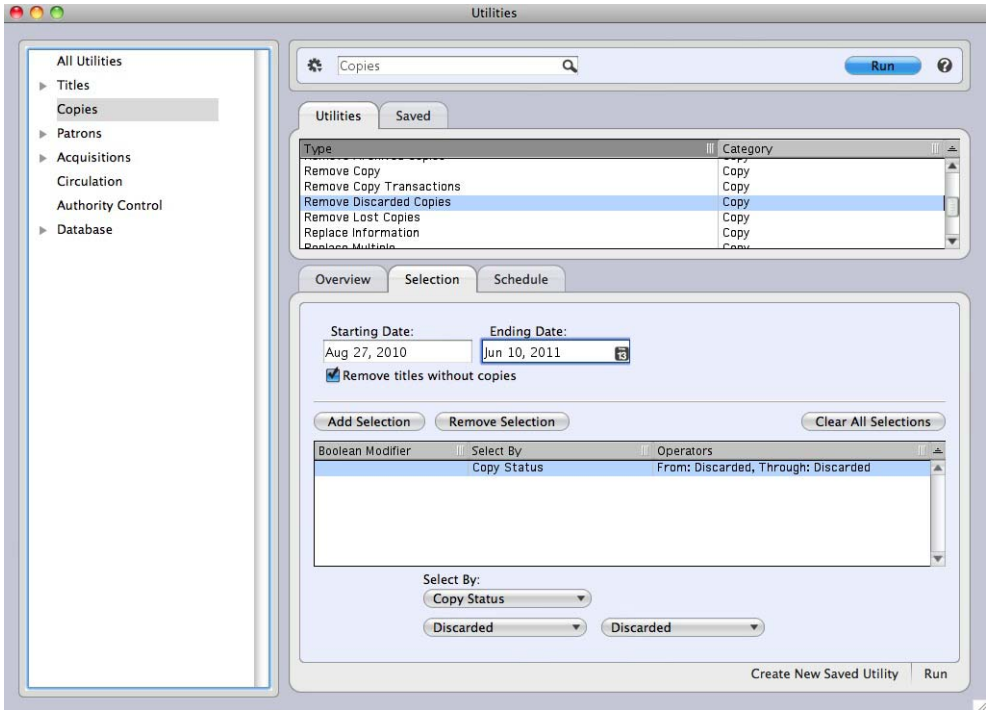
   - In **Check In / Out** mode, type **2** and press **<enter>**.
   - The **Discarded Copies** patron will be the **Current Patron**.
   - Scan the barcode of the first item being discarded.
   - Select the reason for discarding the item and then click on **Discard and Change Mode.**

     Use **Other** to be able to enter specific reasons for discard (i.e. No Use, Out Dated, Loved to Death, etc.) These reasons will be of great value if you need to reorder or replace certain titles.
   - Scan the rest of the items being discarded for the same reason.
   - When finished with the items being discarded for that reason, type a period (**.**) and press **<enter>**.
   - Scan first item with a different reason and enter the new reason for discarding the item.
   - Scan the rest of the items being discarded for that reason.
   - When finished discarding, type a period (**.**) and press **<enter>**.
   - Type an **X** to clear the **Circulation** window.

   To permanently remove lost or discarded items:

   - Click on **Tools** on the menu bar and select **Utilities**.
   - Click on the **Copies** tab then click on the **Selection** tab.

- Click on either **Remove Lost Copies** or **Remove Discarded Copies**.




- Limit the copies to be removed by using the **Starting Date** and **Ending Date** fields.
- If you want to remove titles for which there are no copies, check the **Remove Titles without Copies** box.
- Click on **Run**. When asked if you want to **Archive**, the answer is *always* **Yes**.

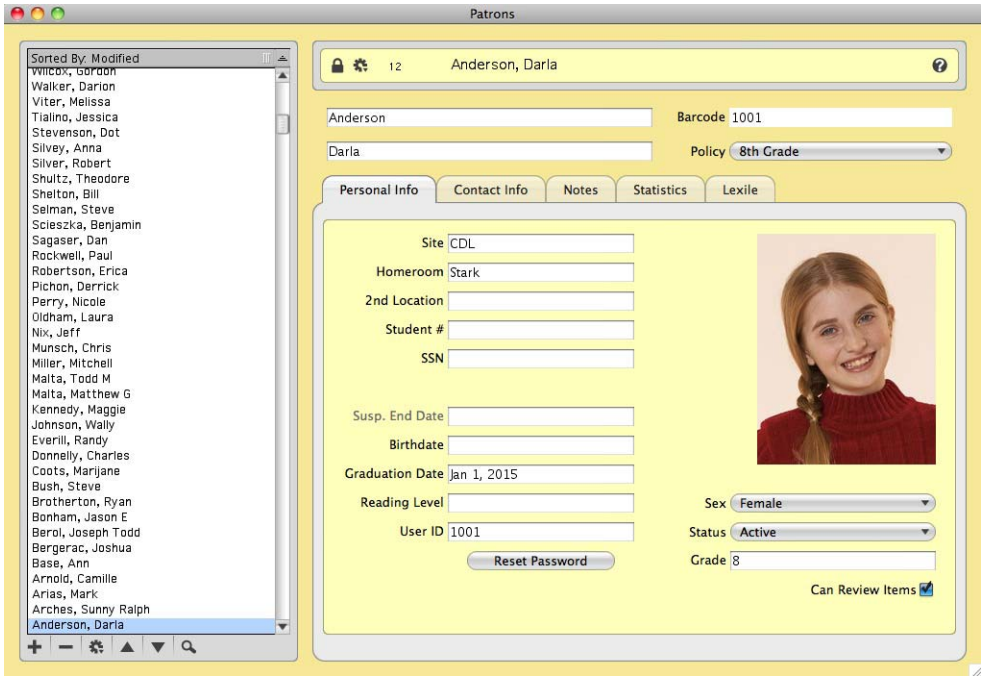
---

## NOTES:

- Use the **Discarded Copies** patron to maintain a record of discarded items until the end of the school year if you must report the numbers of items discarded and the value of the items discarded.
- Using the **Discarded Copies** patron instead of just removing the discarded copies from each item record is faster and also provides information for reports that can be generated to assist in reordering items or in ordering more up-to-date items to replace discarded items. (See **Reports** chapter.)
- When discarding a copy that is checked out to a specific patron because of damage to the item, DO NOT check the item in first. Just check it out to the **Discarded Copies** patron and, when the **Discarded Copies Charges** window opens, charge the patron accordingly for the cost of the item.
- **Whenever running any utility, run an archive or make a backup prior to running the utility.**

# 5 Patrons

## A. Patron Window




## B. Adding Patrons

**1. Add yourself as a new staff member.**

To add a patron record:

- Go to **Show** on the menu bar and choose **Patrons** from the drop-down menu. (TRICK: You may also click on the **Current Patron**'s name or on the words, **No Current Patron**.)
- Click on the **Add** (+) icon at the bottom of the left pane. A blank new patron record will open.
- Tab from field to field as you enter the information about this patron.
- Use the drop-down menus to indicate **Policy**, **Status**, and **Gender** for the patron.
- Click on the **Notes** tab to add notes.
- If you wish to keep **Patron History**, click on the **Statistics** tab and check the **Keep Patron History** box.

  NOTE: You can use your **Patrons System Preferences** to set Alexandria to **Keep Patron History** on all patrons if that is what you want.

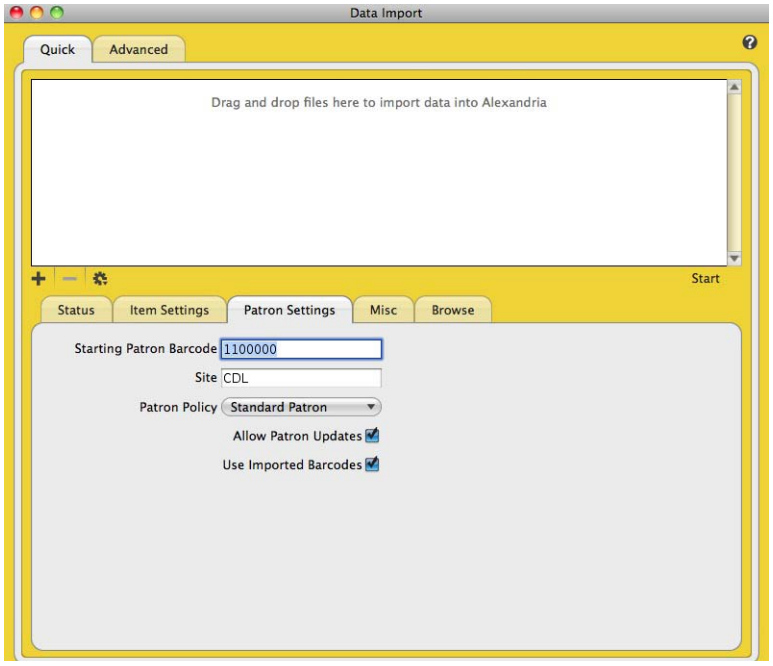
- When finished, click on the **Save** button.

# C. Importing Patron Records

Patron records may be imported into Alexandria from a **tab-delimited file**. If you have a student information system that can export the data on the students in a *tab-delimited format*, please look the **Patrons** management window to determine what fields you wish to have included in the export from your student information system.

To import patron records:

- Go to **Tools** on the menu bar and select **Import** or drag the file from your desktop on top of Alexandria..




- On the **Quick** tab, click on the **Patron** tab.
- Click on the **Add** (+) button at the bottom of the large field in the top section of the window in order to add a file to the list.
- Use the window that opens to find and select the file to be added. Highlight the file, then click on **Open** to add it to the list.
- Set your selections for the options at the bottom of the window.
- Click on **Start** under the large field at the top of the window to begin the patron import.

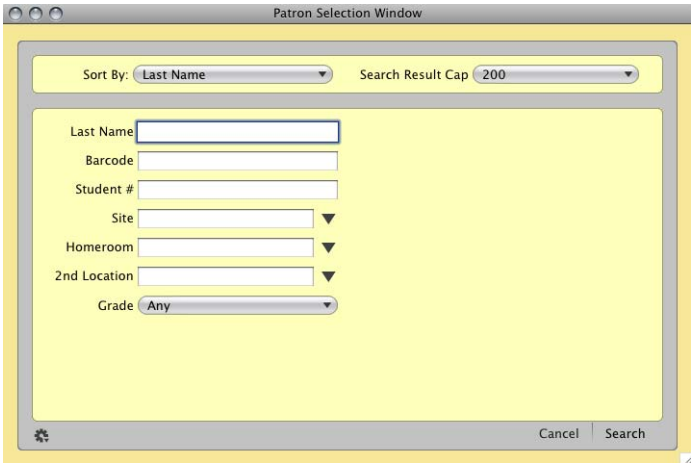
# D. Modifying Patrons

**2. Change Mitchell Miller's phone number to 253-3534.**

To modify a patron record:

- Go to **Show** on the menu bar and choose **Patrons** from the drop-down menu.

- Click on the **Find** icon (magnifying glass) at the bottom of the left pane or click on the **Actions** icon (gear) and select **Find**. The window below will open.




- Make certain that the **Sort By** drop-down menu is set to **Last Name**. Type in the **Patron's** last name and press **<enter>**. Then, select the desired patron from the list in the left pane.

- Unlock the patron's record by clicking on the **Lock** icon or by choosing **Unlock Record** from the **Patron** menu.

- Make changes to the patron's record and click on the **Save** button.

# E. Deleting Patrons

**3. Delete yourself from your patron list.**

To remove a patron record:

- Go to **Show** on the menu bar and choose **Patrons** from the drop-down menu.

- Locate the patron's record.

- Highlight the patron's name in the left pane and click on the **Remove** (-) icon at the bottom of the pane.

  NOTE: If the patron has outstanding items or fines, a dialog box will open informing you of this. Click on **OK**. Patrons cannot be removed if they have items checked out or if they owe fines or charges. You must declare any items lost, forgive any charges or fines and, then, you will be able to remove the patron.

## NOTES:

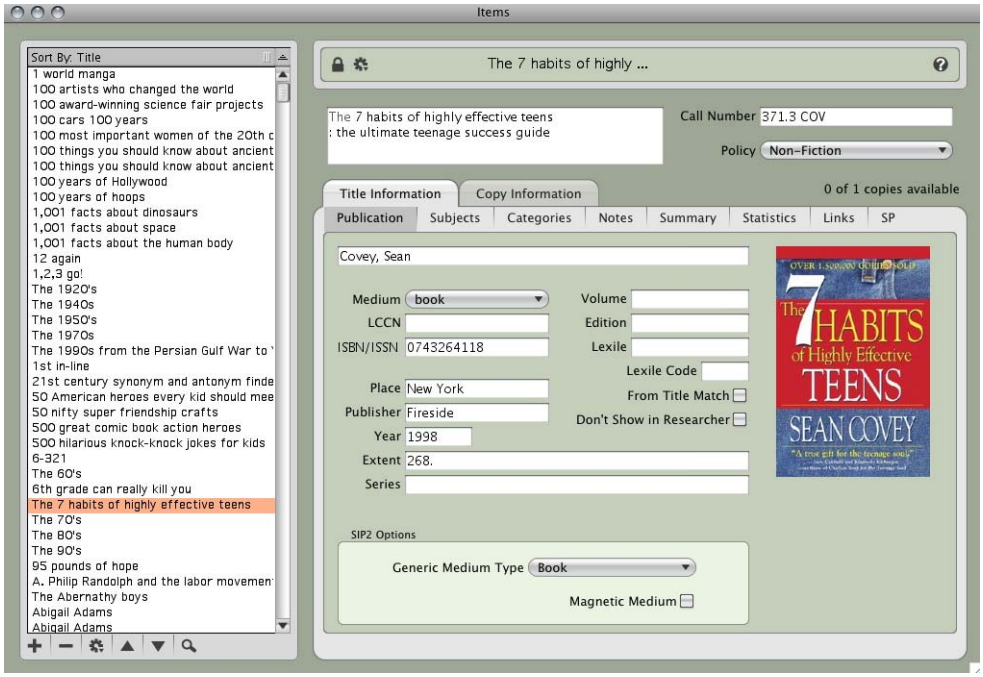
- The only required fields for a patron record are **Barcode**, **Last Name**, **Policy**, **Status**, and **Gender**.
- Alexandria will fill in the **User ID** and **Password** using the patron's last name as the **Password** and the barcode for the **User ID**.

## Let's Practice:

- Add your favorite movie star as a patron.
- Assign him/her to the Staff policy.
- Include an **Alert Note** that indicates that the patron left a jacket in the library.
- Go back into the patron record and remove the **Alert Note**.
- Remove the patron.

# 6 Items

## A. Item Window and Item Menu



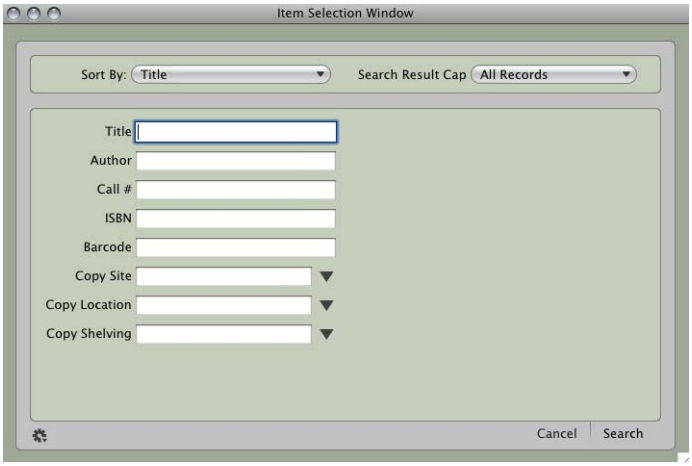

## B. Finding Items

1. **Find** *The 7 Habits of Highly Effective Teens*.

   To find an item record:

   - Go to **Show** on the menu bar and choose **Items** from the drop-down menu.

- Click either the **Find** icon or the **Actions** icon at the bottom-left of the window. The window below will open.




- Enter your search information and click on **Search** in the bottom-right corner of the **Search** window.

  OR

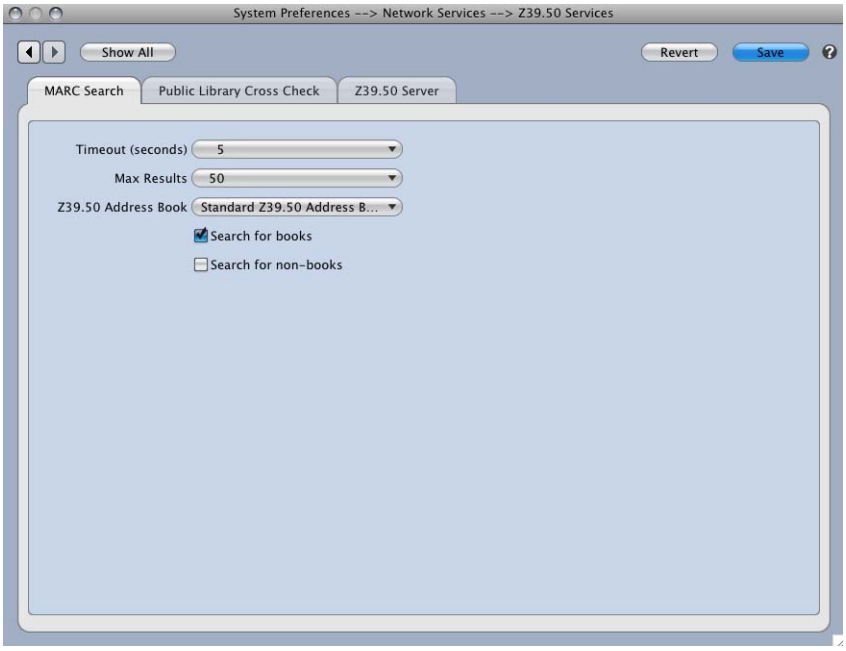
- Click on the **Actions** icon in the bottom-left corner of the window and select either **Advanced Title Search** or **Advanced Copy Search**. Then, enter search text and click on **Search**.

- Your results will be listed in the left pane of the **Items** management window.

## C. Title Assistant / MARC Search

First, you must go to **System Preferences** to set your **MARC Search** options and to select the z39.50 servers that you want to search.

To set MARC Search preferences:

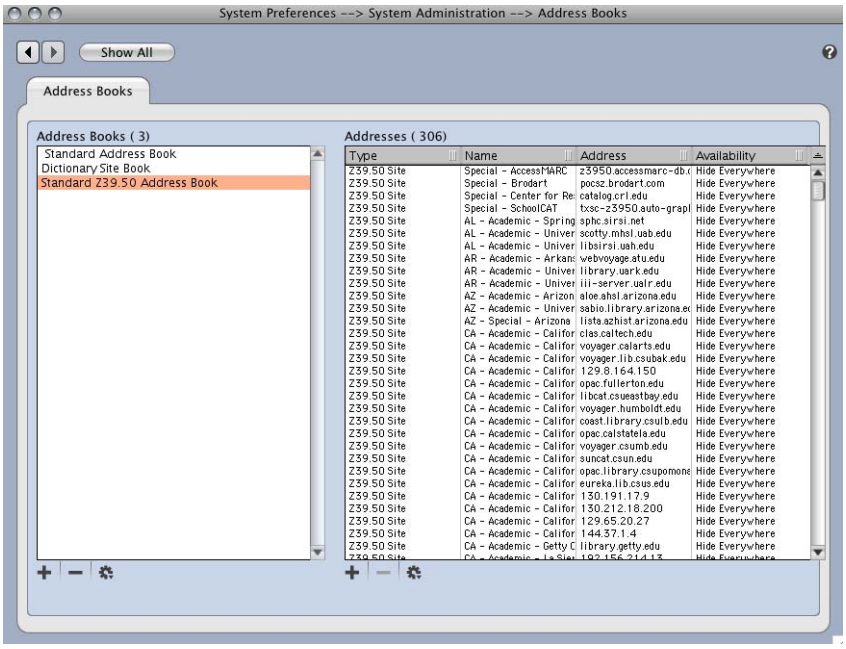



- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **z39.50 Services** in the **Network Services** category of the **System Preferences** window.
- Set the **Timeout** drop-down menu to the amount of time you want. (5 seconds really is sufficient!)
- Set the **Max Results** drop-down menu to the desired number. (50 is usually more than sufficient.)
- If you are not going to be searching for non-book items, take the check mark out of that box.
- Click on **Save** in the upper-right corner of the window.

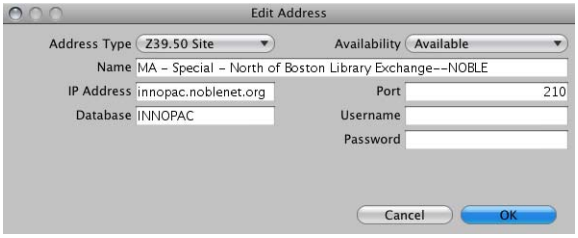
To select z39.50 addresses to search:

- Go to **Edit** on the menu bar and select **System Preferences**.

- Click on the **Address Books** in the **System Administration** category of the **System Preferences**, then click on **Standard z39.50 Address Book** in the left pane of the window.




- Double click on the server you want to activate and the **Edit Address** window will open for that z39.50 address.




- Change the **Availability** to **Available** (will be seen also in **Researcher**) or **Hide in Researcher** (only available for **Title Assistant**) using the drop-down menu and click on **OK**.

- Repeat the previous step until you have selected all the servers that you want. NOTE: There is a limit of 20!!!

- Click on **Save** in the upper-right corner of the window and close the **System Preferences** window.

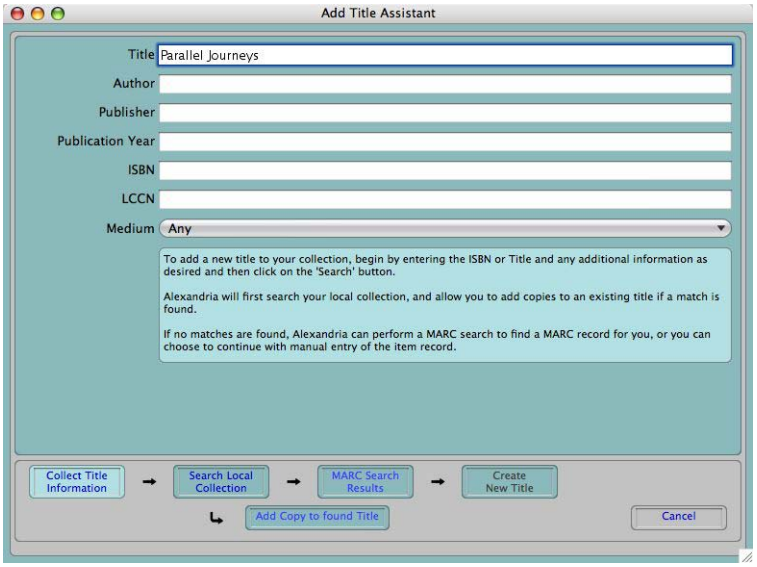
**2. Add the book,** *Parallel Journeys* **by Eleanor H. Ayer with one copy.**

To catalog using Title Assistant:

- Go to **Show** on the menu bar and choose **Items** from the drop-down menu.

- Click on the **Add** (+) icon.

- Enter the **ISBN** or **Title** and press **<enter>**.

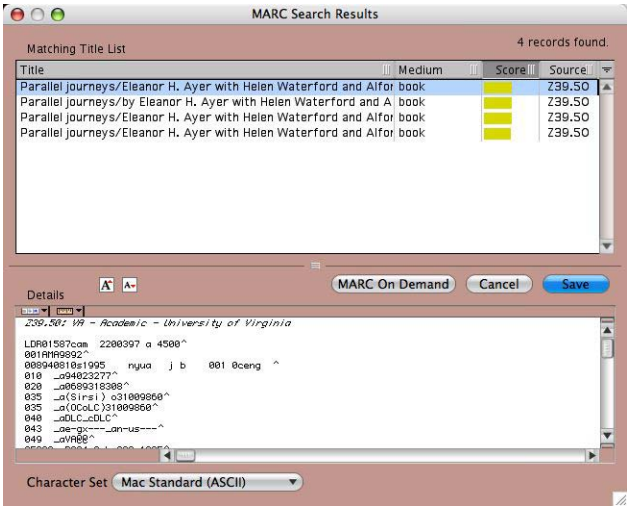

Add Title Assistant
Title
Parallel Journeys
Author
Publisher
Publication Year
ISBN
LCCN
Medium
Any
To add a new title to your collection, begin by entering the ISBN or Title and any additional information as desired and then click on the 'Search' button.
Alexandria will first search your local collection, and allow you to add copies to an existing title if a match is found.
If no matches are found, Alexandria can perform a MARC search to find a MARC record for you, or you can choose to continue with manual entry of the item record.
Collect Title Information
Search Local Collection
MARC Search Results
Create New Title
Add Copy to found Title
Cancel

Alexandria will search your own database first and show any potential matches. Look at the titles shown and, if one is a match, highlight that title and click **Add Copy to Found Title**.

If there are no matches in your database, Alexandria will go directly to **MARC Search.**

- If none of the results from your database are matches, click the **MARC Search Results** button.

- Look at the results that are returned. Highlight the one that matches or best matches your item and click on **Save**.


MARC Search Results
Matching Title List
4 records found.
Title
Medium
Score
Source
Parallel journeys/Eleanor H. Ayer with Helen Waterford and Alfor book Z39.50
Parallel journeys/by Eleanor H. Ayer with Helen Waterford and A book Z39.50
Parallel journeys/Eleanor H. Ayer with Helen Waterford and Alfor book Z39.50
Parallel journeys/Eleanor H. Ayer with Helen Waterford and Alfor book Z39.50
MARC On Demand
Cancel
Save
Details
Character Set
Mac Standard (ASCII)

- Add or modify the **Call Number** and select the proper **Policy** for the item from the **Policy** drop-down menu.

- Modify any fields that you wish to modify. When finished, click on the **Save** button in the upper-right corner of the window.

- You will be asked if you want to add a copy. If so, click **Yes** and fill in the fields on the **Copy Information** tab's subtabs.
- Add or modify the **Call Number** for and select the proper **Policy** for the copy if these are different from the **Title Call Number** and the title's **Policy**.
- Click **Save** when finished on both the **Copy Information** tab and the **Title Information** tab's subtab.
- When all copies have been added, click on **Save** in the upper-right corner of the **Item** window.

## D. Cataloging a Website

**3. You have found a wonderful website on Japanese-American internment camps camps that you want to your database.**

To catalog a website:

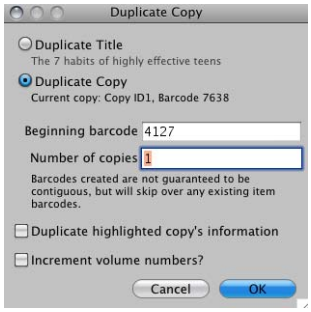
- go to **Show** on the menu bar and select **Items** from the drop-down menu.
- Click on the **Actions** (gear) icon at the bottom of the left pane and select **New Record (Manually)** from the drop-down menu.
- Enter the name of the website in the **Title** field, change the policy to **Web** and the medium to **URL**.
- Enter any other information that you desire on the **Title Information** subtabs (**Publication**, **Subjects**, **Categories**, **Notes**, and **Summary**).
- Click on the **Links** tab and then click on the **Add** (+) icon at the bottom of this tab in the right pane of the window.
- In the **URL Attachment Definition** window, enter the name of the website in the **URL Name (Description)** field and type or paste the URL in the **URL Location** field (http://www.asianamericanmedia.org/jainternment.html). Then, click on **OK**.
- Click on **Save**.
- When asked if you want add a copy to the title, click on **No**.

## E. Duplicating Copies or Titles.

To duplicate copies:

- Open the item record in the **Items** management window.
- Unlock the **Item** record.
- Click on the **Copy Information** tab.

- Click on **Actions** icon at the bottom of the left pane and select **Duplicate**.


Duplicate Copy
Duplicate Title
The 7 habits of highly effective teens
Duplicate Copy
Current copy: Copy ID1, Barcode 7638
Beginning barcode 4127
Number of copies 1
Barcodes created are not guaranteed to be contiguous, but will skip over any existing item barcodes.
Duplicate highlighted copy's information
Increment volume numbers?
Cancel
OK

- On the **Duplicate** window, **Duplicate Copy** should already be selected.
- Fill in the **Beginning Barcode** field and / or enter the number of additional copies you wish to add in the **Number of Volumes** field.
- If duplicating copies, then check any of the boxes that you want to apply.
- Click **OK**.

# F. Assigning Keywords from Circulation (V)

The **V** command enables you to quickly and easily add an entry for the same subject, bibliography, curriculum to multiple items.

To assign keyword using the **V** command:

- In the command line, type **V <space>** the letter code for the desired field (such as **B** for Bibliography, **C** for Curriculum, etc.) **<space>** and the text you want entered in that field (i. e. **V B 8th Grade English Reading List 2010**) and press **<enter>**.
- Scan the barcodes of the items to have this keyword(s) assigned.
- When finished, type a period (.) and press **<enter>**.

NOTE: Possible areas to use with this command are:

**A** — Awards Note

**B** — Bibliography

**C** — Curriculum

**I** — Interest/Reading Code

**S** — Subject

**R** — Study Program

**P** — Point Count

**T** — Test Number

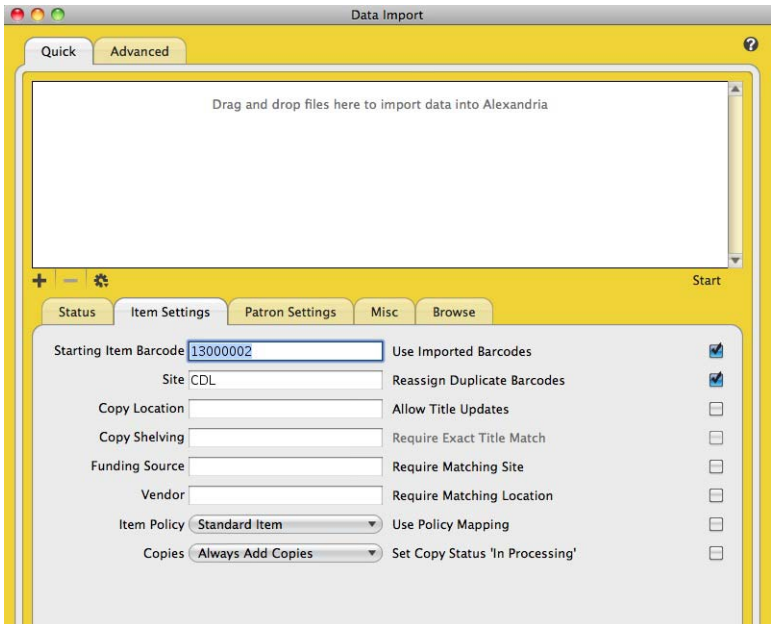
**H** — Holding Code

# G. Importing Items from a Vendor File

To import item records from a vendor file:

Item records may be imported into Alexandria in MARC, MicroLIF, or tab-delimited formats.

- Go to **Tools** on the menu bar and select **Import**. You may also drag the file from your desktop on top of Alexandria.




- Check the **Archive First** option on the **Status** tab.
- Click on the **Add** (+) icon under the **File** field in order to add a file to the list. If you dragged and dropped your file, then it should already be showing and you may skip the next step.
- Use the window that opens to find and select the file to be added. Highlight the file, then click on **Open** to add it to the list.
- Click on the **Item Settings** tab and set your selections for the options on this tab.
- Click on **Start** under the **File** field to begin the item import.

---

# NOTES:

- Minimum fields for an item are **Title**, **Number of Non-filing Characters**, **Policy** and **Medium**. All fields except **Title** will have defaults supplied by the program. The only required field for a copy added to a title is **Barcode**.
- The **Title**, **Author** and **Series Editor Action** (gear) icons are in the bottom-right corner of the respective entry fields. Using these editors, you can easily enter multiple detailed fields and add new tags to any item's MARC record.

- Clicking the + icon brings up a selection of additional types of title tags that can be added to the item record.

- Clicking the **a** icon brings up fields that can be added to the selected tag. A field can be changed to another field designation by clicking on the letter of the subfield and typing the desired field indicator.

- The - icon removes a tag completely. Leaving a field blank removes that field when the record is saved. The **Q** icon allows for quick entry of secondary authors and subject headings; however, use this only when entering information in the _a field.

- On the **Subjects** tab and in the various editors, the **Up** and **Down Arrow** icons allow you to move from field to field in each tag.

- You cannot remove items that have copies checked out until they are declared lost or discarded.

- Since the MARC record is very particular, it is not recommended for the novice cataloger to use the **MARC Editor** when cataloging. All the fields on the simple Item management window are linked to specific MARC record tags. Modifying, adding or removing information from the simple fields will change the MARC record. A basic rule-of-thumb is that if you don't know a 245 from a 600 from a 740, then you should not use the **MARC Editor**.

- To learn more about MARC records, tags, and subfields, go to http://www.loc.gov/marc and click on **Bibliographic**, then select the desired tag.

# 7 Researcher (OPAC)

## A. Types of Search Interfaces

## B. Search Filters

## C. Rules of Searching

The four rules of searching Alexandria are:

- Put a period at the end of the search term. Remember that the “period/dot” command says “I’m done, this is all I want, get me out of here.” Alexandria is a “begins with search.” Using the period makes it an exact match search.

1. **Search for “cat.”**

    - If you can’t spell, use the **Browse** feature.

2. **A student can’t spell civilization. Using** Browse**, enter civ.**

3. **Using** Browse**, search for “brown” -- All Words, Title, Author, etc.**

    - Two words typed in the same search field is the equivalent of a Boolean AND search with both words being exact match searches.

4. **You want items about the Civil War.**

    - If you are combining Boolean AND and OR searches, the term that has to go with all (the AND search) goes last.

5. **Search for items about Greek or Roman mythology.**

To conduct a search:

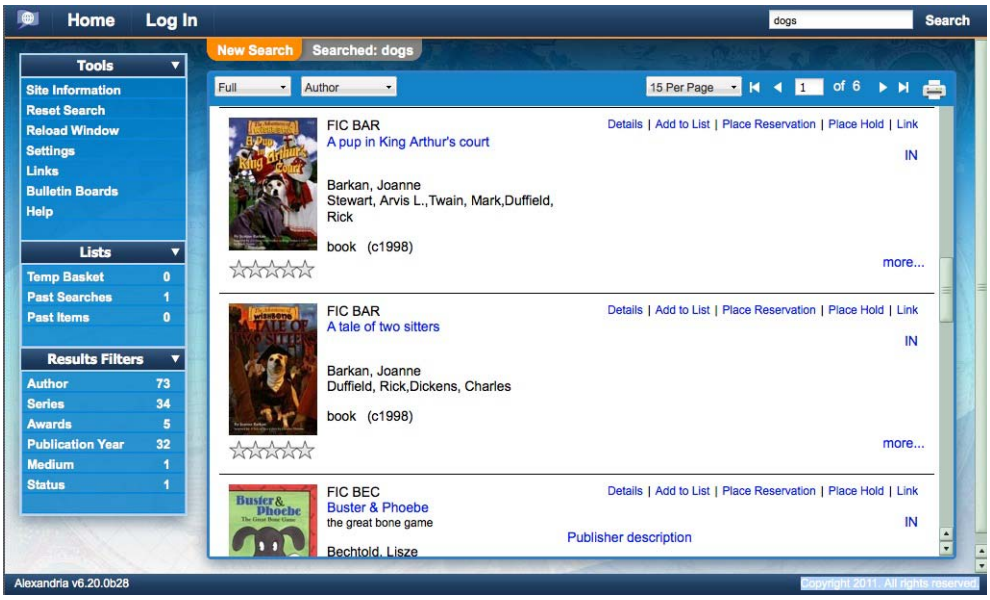
- Enter search term(s) in the **Search** field.

- If you desire to use any filters, click on the **Search Filters** option and set the desired filters.

- Click on the appropriate search icon or just press **<enter>** to conduct an **All Words** search.

# D. Results Screen

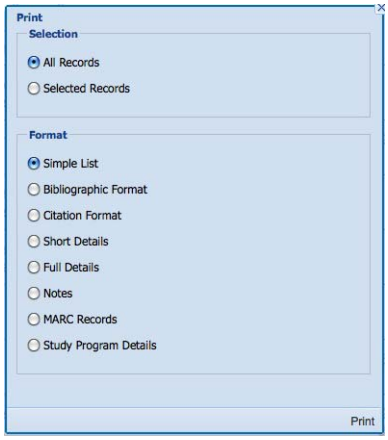
## a. Types of Results




## b. Ordering Results

## c. Results Filters

## d. Printing Results

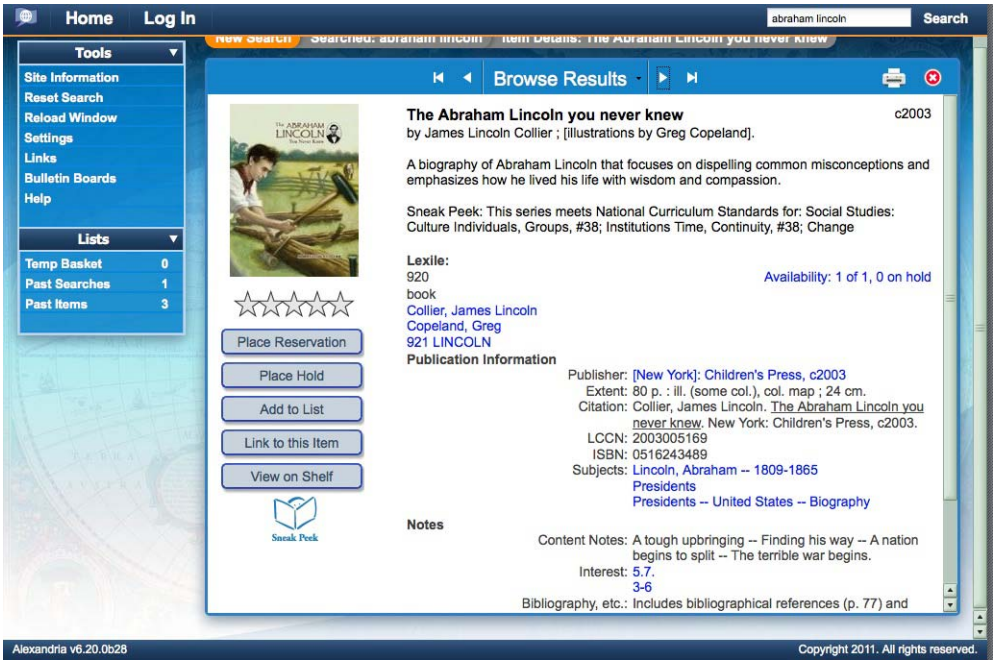


### e. Temp Basket

6. **Search for dogs. Using the** Search Results List**, select the first 5 titles, then select every other title from the remaining titles on the list**. **Add these items to the** Temp Basket. **Perform a new search for Cats and select 6 items to add to the** Temp Basket**.**

   To pick items for the **Temp Basket**, click, drag and drop on the **Temp Basket**. You may also click **Add to List** in **Full** view or the **Item Results** window.

## E. Item Record


Home
Log In
abraham lincoln
Search
Tools
Site Information
Reset Search
Reload Window
Settings
Links
Bulletin Boards
Help
Lists
Temp Basket 0
Past Searches 1
Past Items 3
Browse Results
The Abraham Lincoln you never knew
c2003
by James Lincoln Collier ; [illustrations by Greg Copeland].
A biography of Abraham Lincoln that focuses on dispelling common misconceptions and emphasizes how he lived his life with wisdom and compassion.
Sneak Peek: This series meets National Curriculum Standards for: Social Studies: Culture Individuals, Groups, #38; Institutions Time, Continuity, #38; Change
Lexile:
920
book
Collier, James Lincoln
Copeland, Greg
921 LINCOLN
Availability: 1 of 1, 0 on hold
Place Reservation
Place Hold
Add to List
Link to this Item
View on Shelf
Sneak Peek
Publication Information
Publisher: [New York]: Children's Press, c2003
Extent: 80 p. : ill. (some col.), col. map ; 24 cm.
Citation: Collier, James Lincoln. The Abraham Lincoln you never knew. New York: Children's Press, c2003.
LCCN: 2003005169
ISBN: 0516243489
Subjects: Lincoln, Abraham -- 1809-1865
Presidents
Presidents -- United States -- Biography
Notes
Content Notes: A tough upbringing -- Finding his way -- A nation begins to split -- The terrible war begins.
Interest: 5.7.
3-6
Bibliography, etc.: Includes bibliographical references (p. 77) and
Alexandria v6.20.0b28
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## F. Reviews

### a. Preference Settings:

- Go to **Edit** on the menu bar and select **System Preferences**.
- Click on **Security** in the **System Administration** category.
- Double click on a **Security Level** for which you want to set the ability to **Add**, **Edit** or **Remove** reviews.
- Set the **Reviews** drop-down menu as desired. Click on **Save**.
- Repeat for all **Security Levels**.
- Click on **Show All** button in the top-left corner of the window.
- Click on **Rules** in the **Circulation** category.
- Click on the **Rules** tab and check the box for **Enable Reviews** if you wish to allow patrons to review items.

- **Save** and, then, exit **System Preferences**.

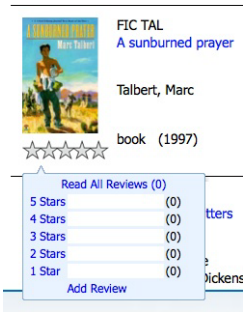
## b. Patrons Management

- Click on **Show** on the menu bar and select **Patrons**.
- Note the check box in the lower-right corner, **Can Review Items**. if this option is checked, then that patron can review items.

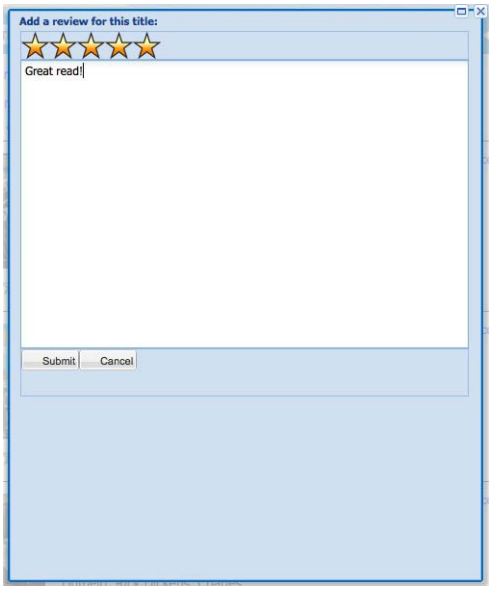
7. **Darla Anderson wants to put a review on** *A Child Called It*. **Username:** 1001 **Password:** Anderson.

   For a patron to add a review:

   - Patron must log in in the **Researcher**.
   - Perform search to locate title.
   - Click on "**Stars**", then, click on **Add Review**.

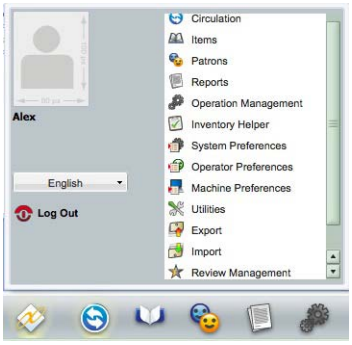



   - Click on number of stars and fill in text for the review. Click on **Submit**.

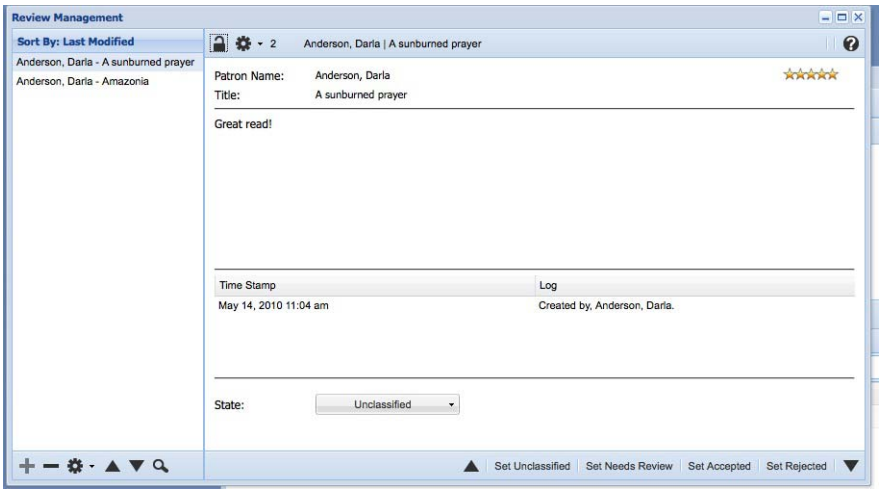


**8. As the librarian, review Darla's review and decide whether to accept it or reject it.**

- Log in as an operator in the **Web Librarian**. (**Username**: Alex **Password**: Alex)
- Click on the **Alexandria** symbol and select **Review Management**.

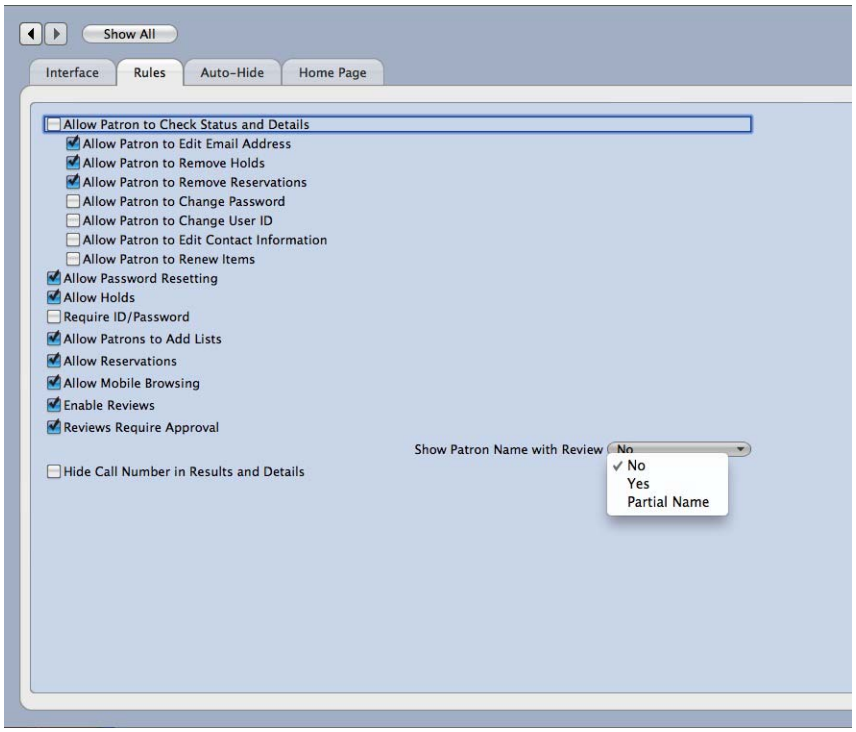



- Unlock the **Review Management** window, select the review, click on the desired action.




**Save**.

## G. Researcher Preferences




# NOTES:

- You can move between fields on a **Boolean** search using the **<tab>** key.
- You can change the **Boolean** operator for an **And** to an **Or**, **And Not**, or **Through** by clicking on the arrow in the field with the **And** operator and highlighting the operator of your choice.
- Use the **Through** operator to select a range of search terms such as authors starting with A - AD or call numbers 500 - 525.
- Holds and reservations may be made from the list in the **Full Results** view**.** When a **Brief Results** view list is generated, holds and reservations must be done from the **Item Details** window.

# 8 Reports

Reports are divided into groups and are accessed by clicking on **Tools** on the menu bar and selecting **Reports**. On the **Reports** window, click on the category in the left frame which represents the type of report you want. Each category has subcategories that further group the possible report types.

Remember that reports print first to the screen, so you will waste no paper if the resulting report is not exactly what you want.

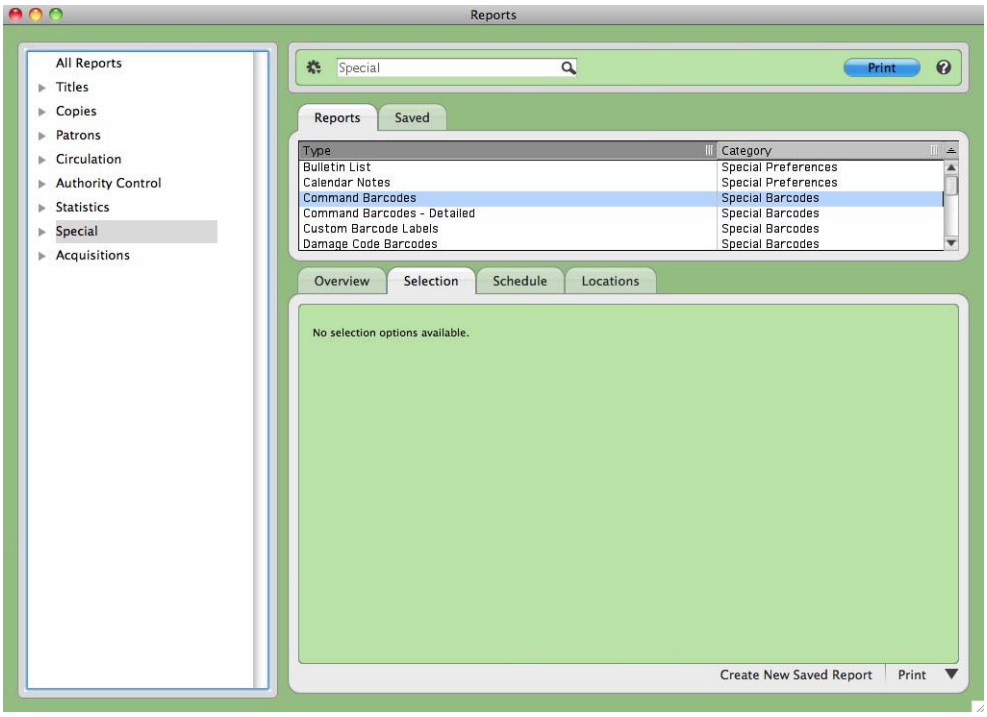
To set up a report:

- Go to **Tools** on the menu bar and select **Reports**.
- Click on the appropriate tab that represents the type of report you want.
- Click on the category and/or subcategory in the left frame that is the best choice for the report you want to generate.
- Click on the **Name** of the report in the main (right) frame.
- If the **Format** drop-down menu appears for that report giving you a choice of formats, select the desired one.
- Select the **Sort By** option from that drop-down menu.
- If you want to narrow the results, from the **Select By** drop-down menu, select the first selection option. (If you are in a Central Union system, this should be **Site**, **Library**, or **School** depending on which option is listed.)
- If additional selection options are needed, click on the **Add Selection** button above the **Boolean List** area. Set the **Boolean Operator** drop-down menu as desired and change the **Select By** drop-down menu to your second selection choice. Repeat for as many selection options as you need for the report.
- Click on **Print** to print, **Print PDF** to generate the report in PDF format. The report will print to the screen. To print a hard copy of the report, go to **File** on the menu bar and click on **Print**.
- If the report generated meets your needs and you want to save it for use in the future, click on the **Create New Saved Report** in the bottom-right corner of the window or click first on the **Overview** tab if you want to mark it as a favorite before clicking the **Create New Saved Report** button.
- Click on **OK**.

**NOTE:** We will cover the other tabs in the **Edit New Report** window later in this chapter.

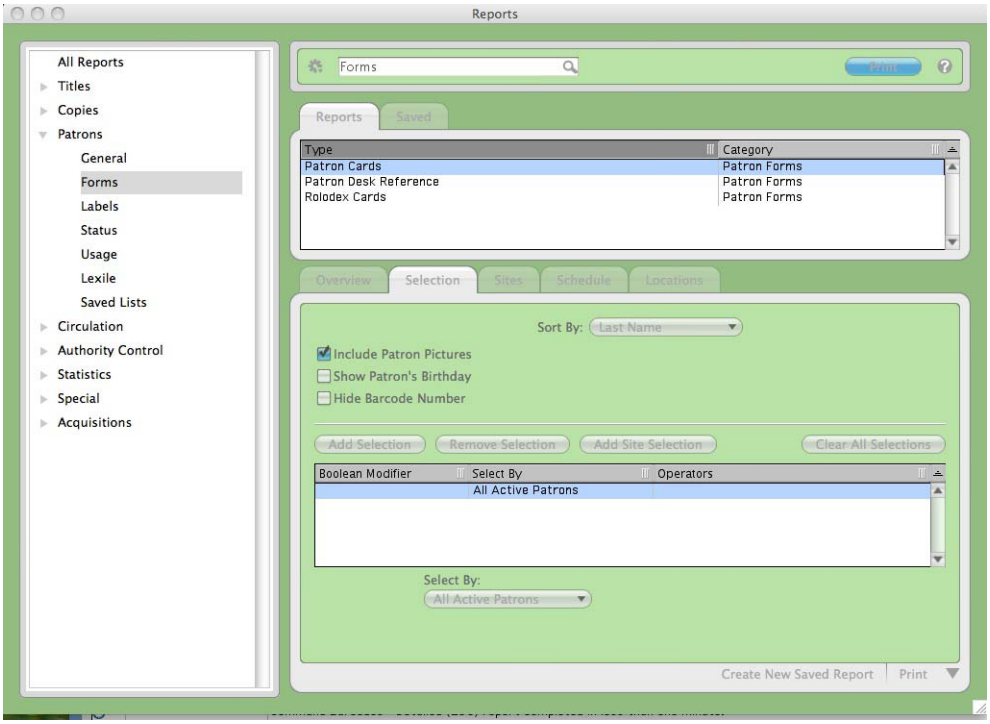
With over 15,000 possible reports, it's impossible to talk about all of them. The reports highlighted in this chapter are those we feel will have the most value to libraries.

# A. Special Reports

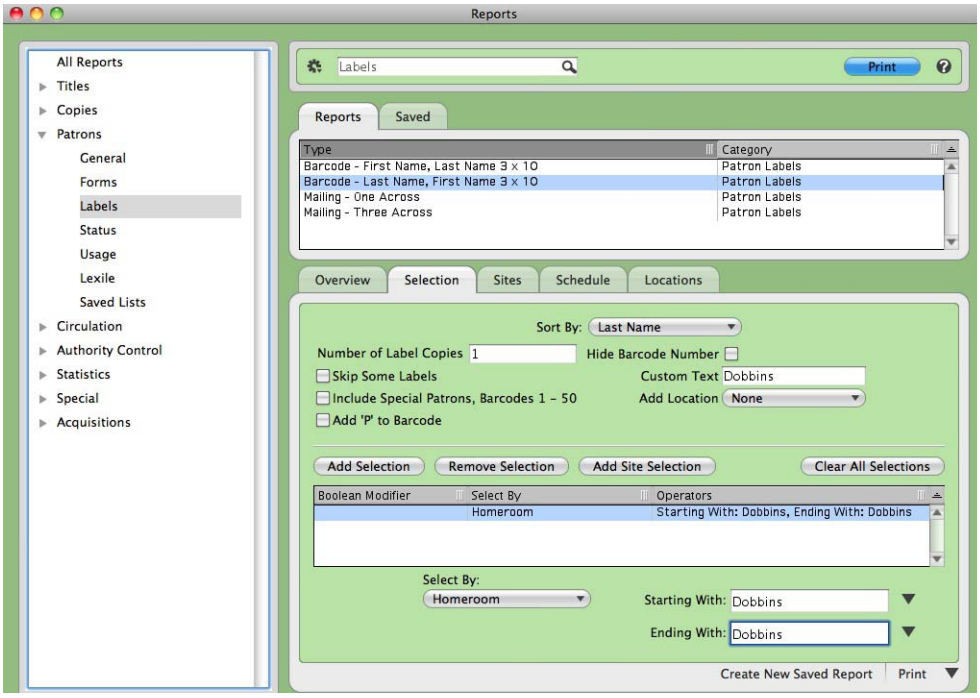



# B. Patron Reports

## Patron Cards

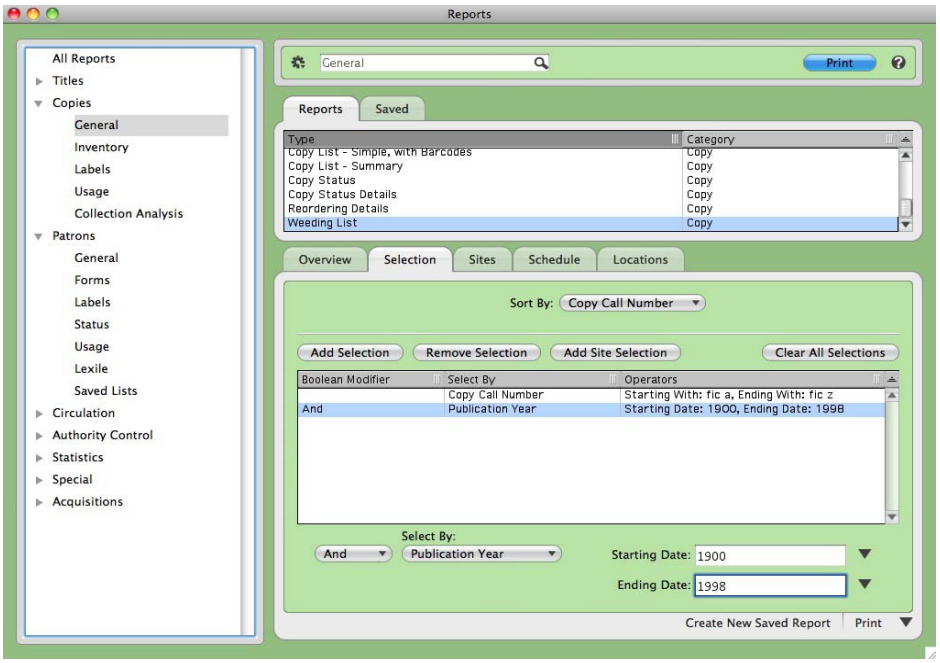


## Patron Barcodes by Homeroom

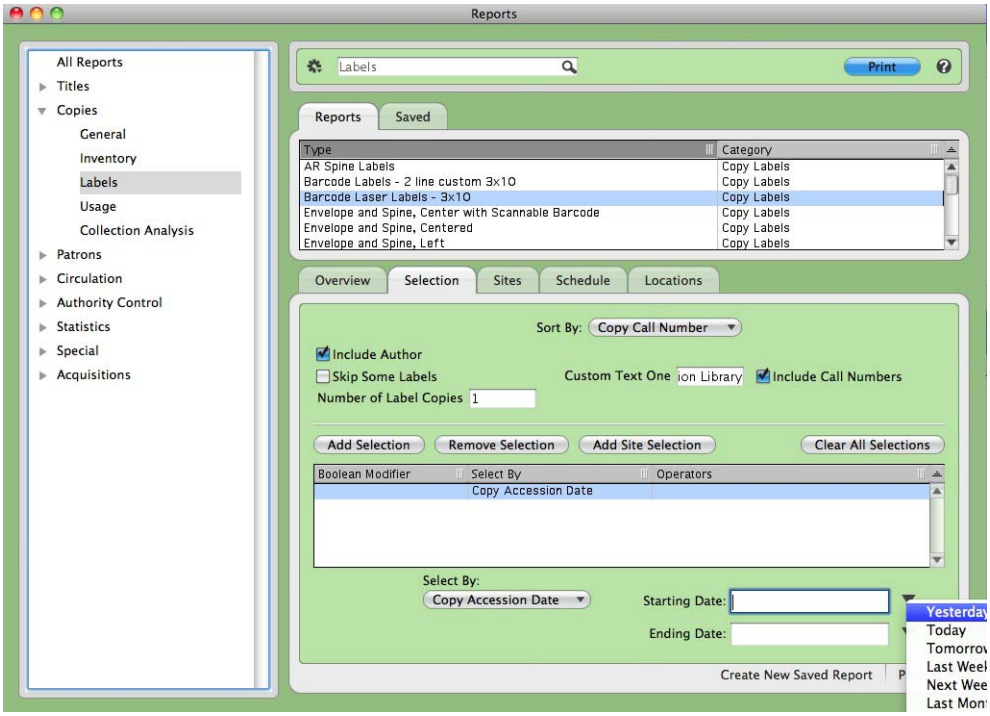



# C. Items Reports

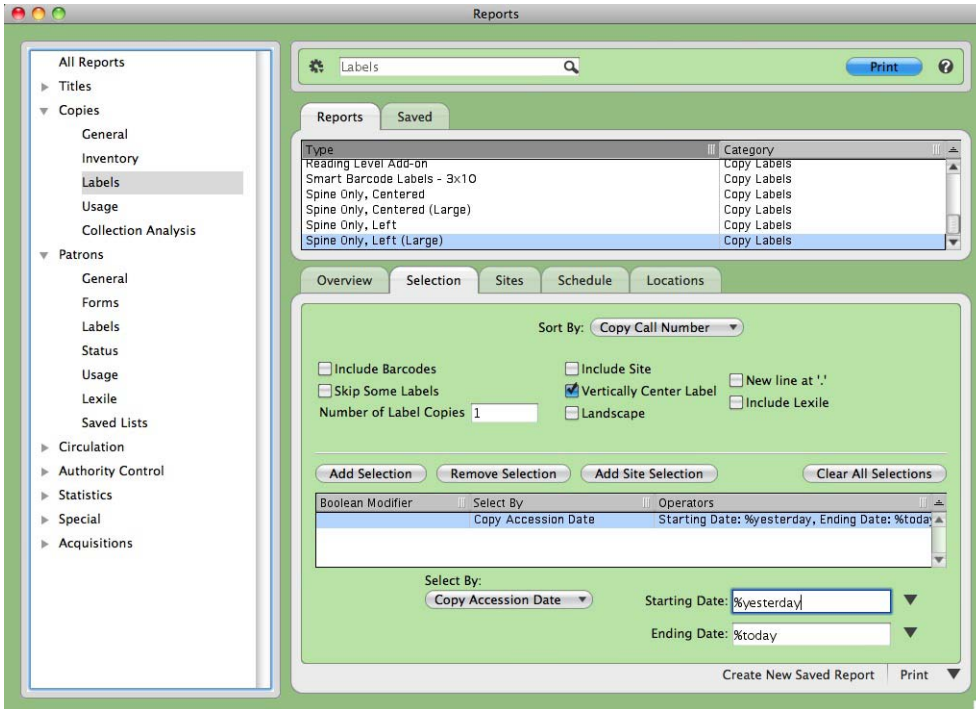
## Weeding List



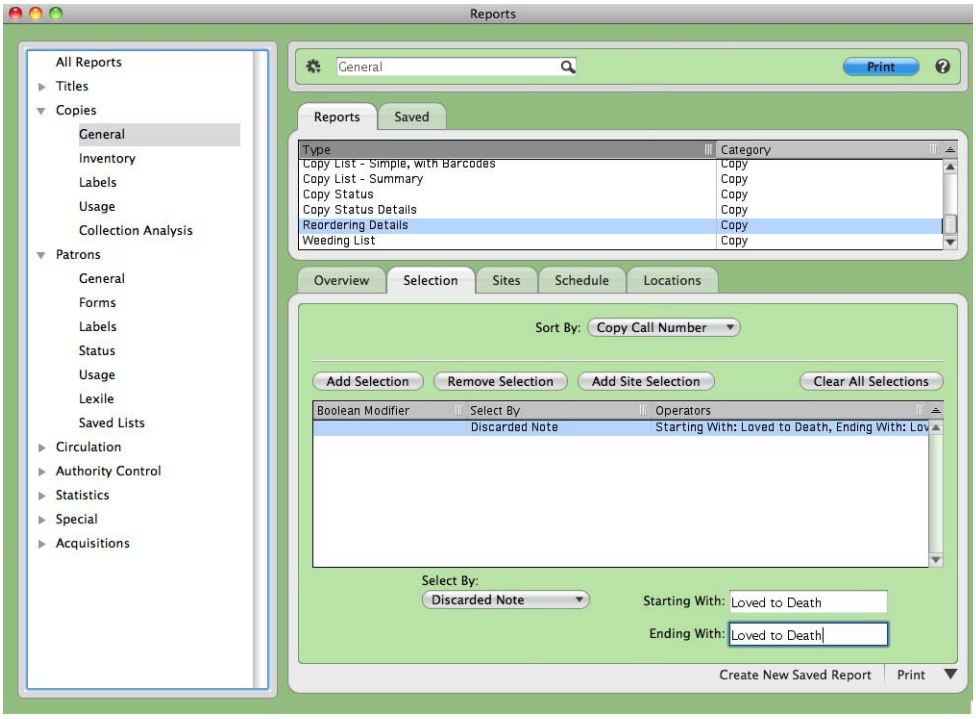
## Barcode Labels



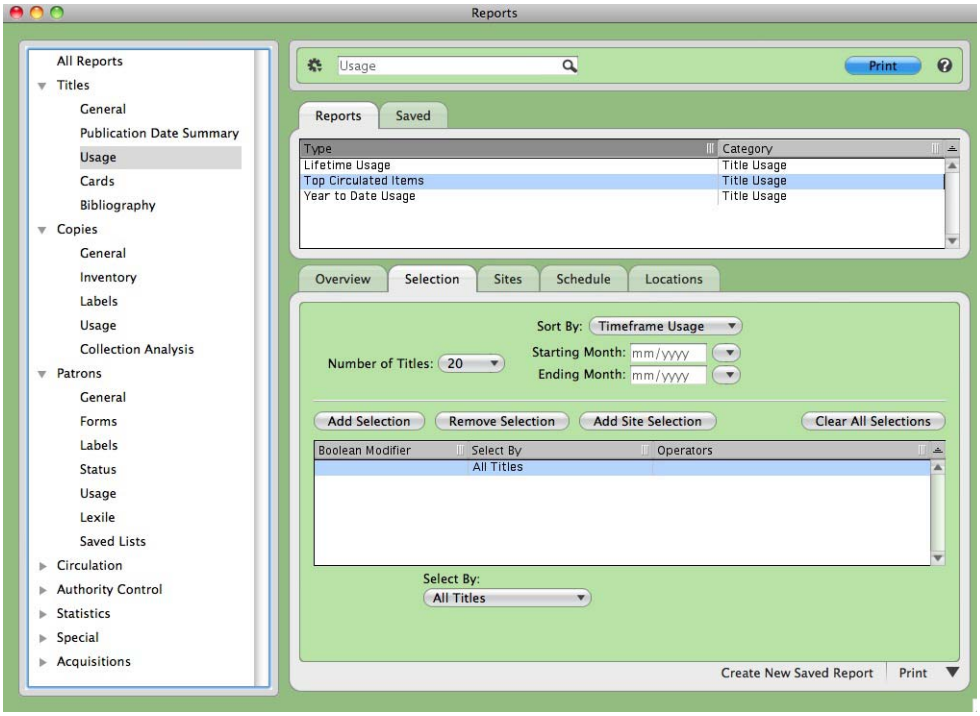

## Spine Labels



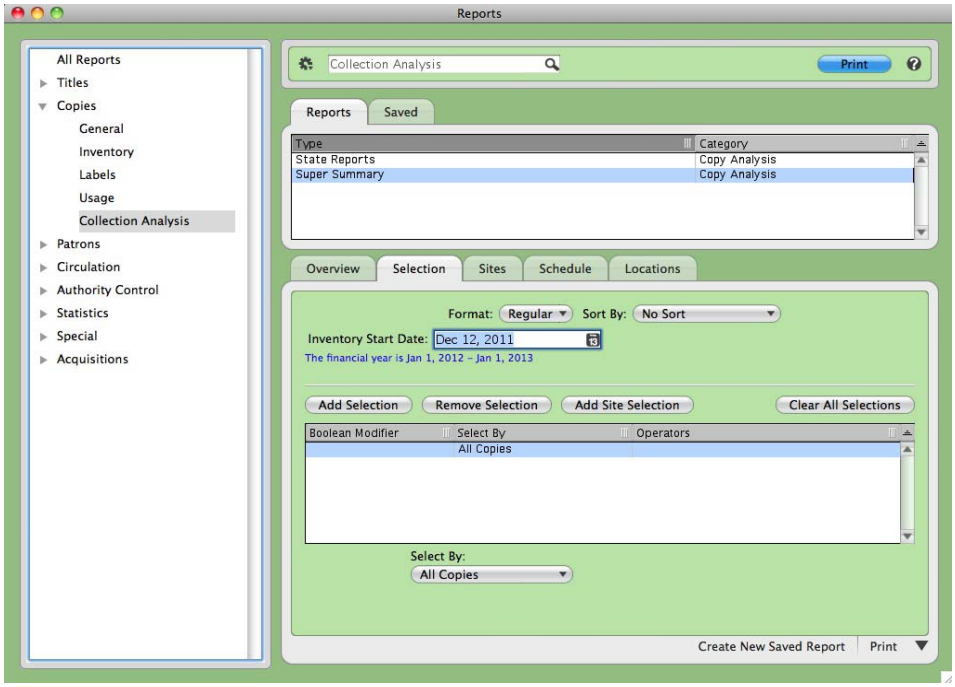
## Reordering Details




## Top Circulated Items

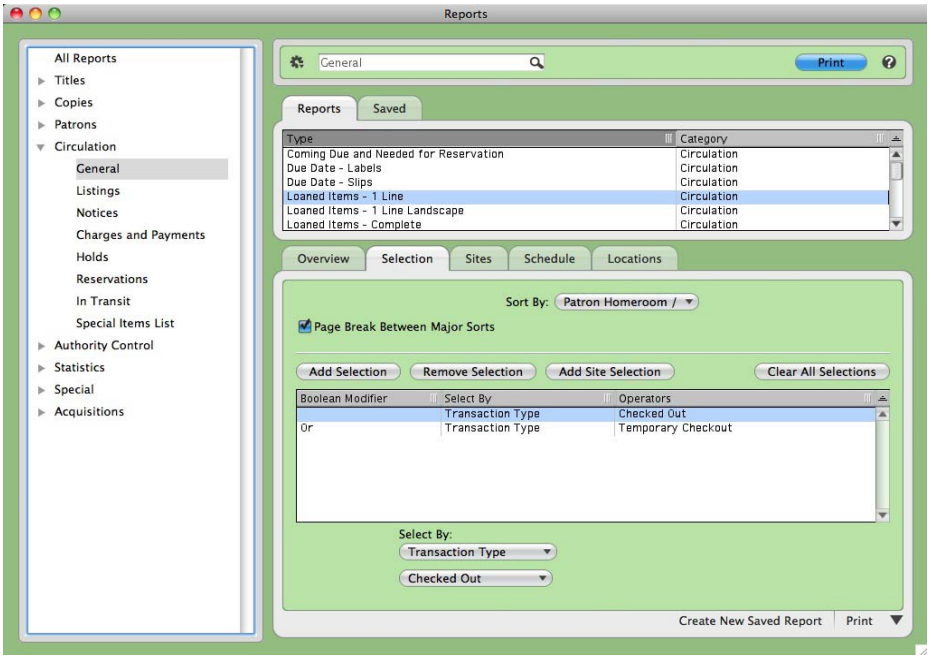


## Super Summary

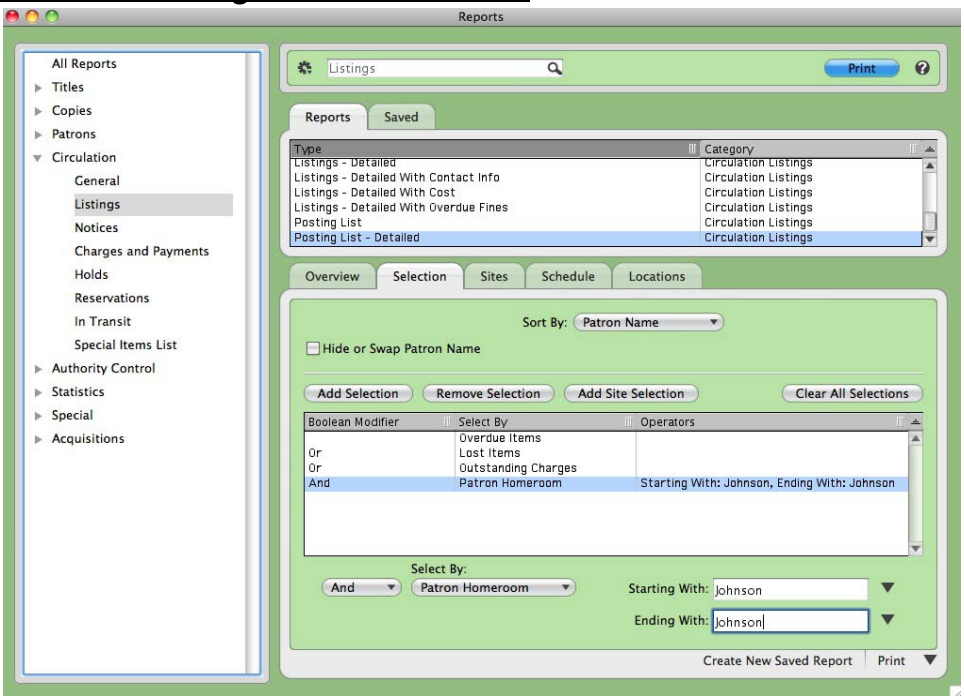


# D. Circulation Reports

## Loaned Items




## Circulation Posting List — Detailed

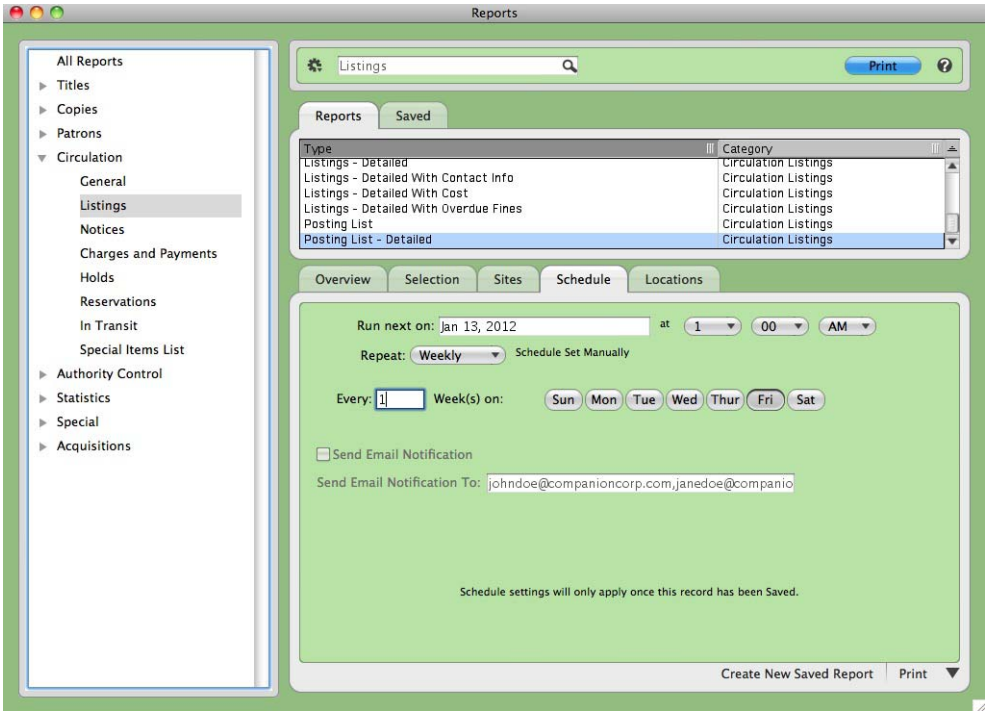



With the new feature in available starting with version 6.0.0 that allows you to schedule reports and send them as email attachments, setting up this report to be sent out automatically makes management of overdue notifications to teachers so simple. Yes, it will take a little bit of time initially, but the rewards will be endless.

After the initial report has been set up, let's add the **Select By** option of **Homeroom** and enter a homeroom in the **Starting With** and **Ending With** fields. For this example, we will enter Wishard in both of these fields.

- If you are part of a Central Union system, select your library from the **Available Sites** list on the **Sites** tab and use the > to **Selected Sites** list.

Go to the **Schedule** tab and fill in the date that you want the report to run next, then, set the **Time** drop-down menus. We suggest that you set this for a time of day early in the morning so that it will be there when the school day begins and the teacher checks his or her email.

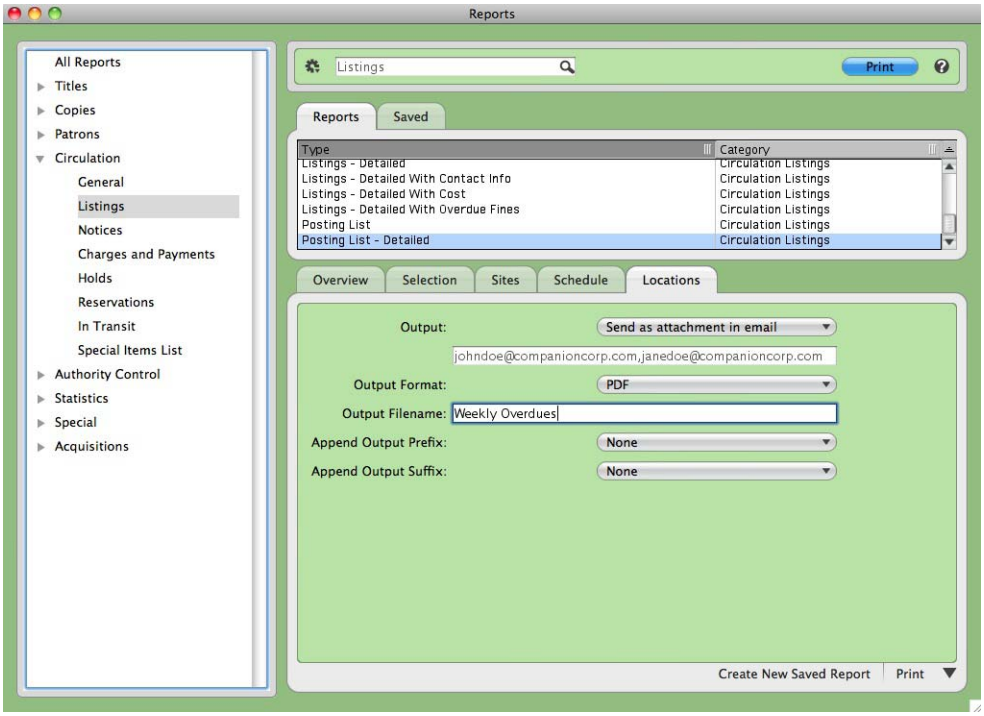



- Set the **Repeat** drop-down menu to **Weekly,** click on the **Day** of the week for it to run and set the **Every** field to 1.

- Check the **Send Email Notification** box and fill in your email address in the field provided.

- Click on the **Locations** tab and set the **Output to** drop-down menu to **Email Attachment** and fill in the email address of the teacher. You may send the report to more than one person, just separate the email addresses with a comma. (We suggest that you send a copy to

yourself.) If a user name and password are necessary in order to send the email, enter those things in the fields provided.

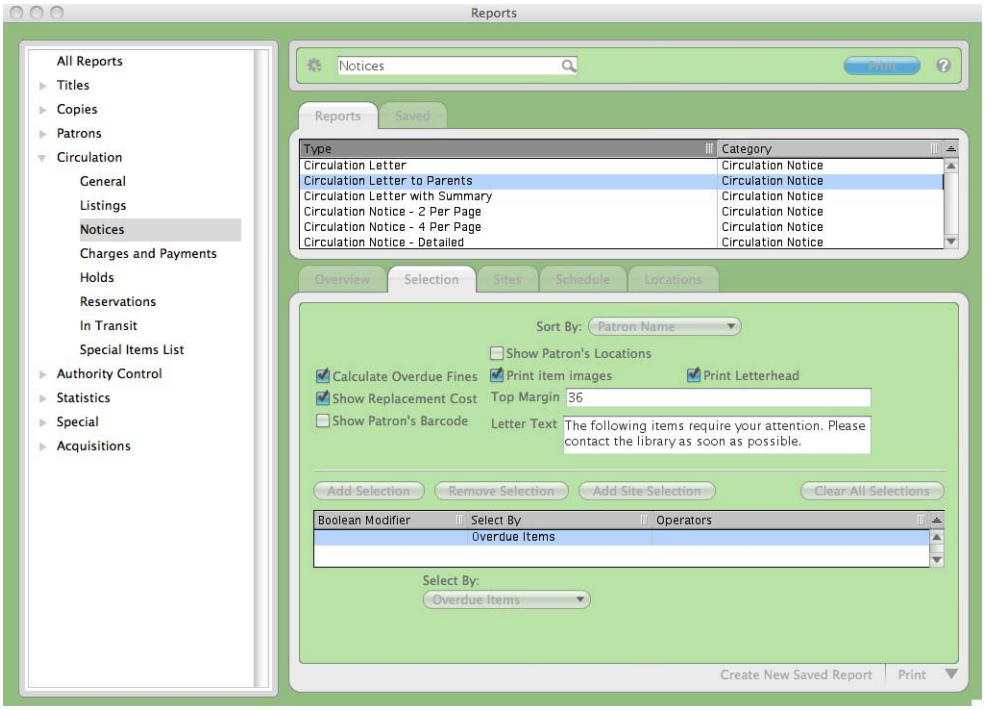



- Set the **Output Format** drop-down menu to **PDF** and give it a name such as Wishard Overdues. Set the **Append Prefix** to **Date** if you want the file dated.

- Click on the **Overview** tab and fill in a **Name**, **Description** and **Notes** (i.e. Weekly Overdues for Johnson's class, PDF sent by email on Fridays at 1 a.m). Check **Favorite** if you want the report as a favorite.

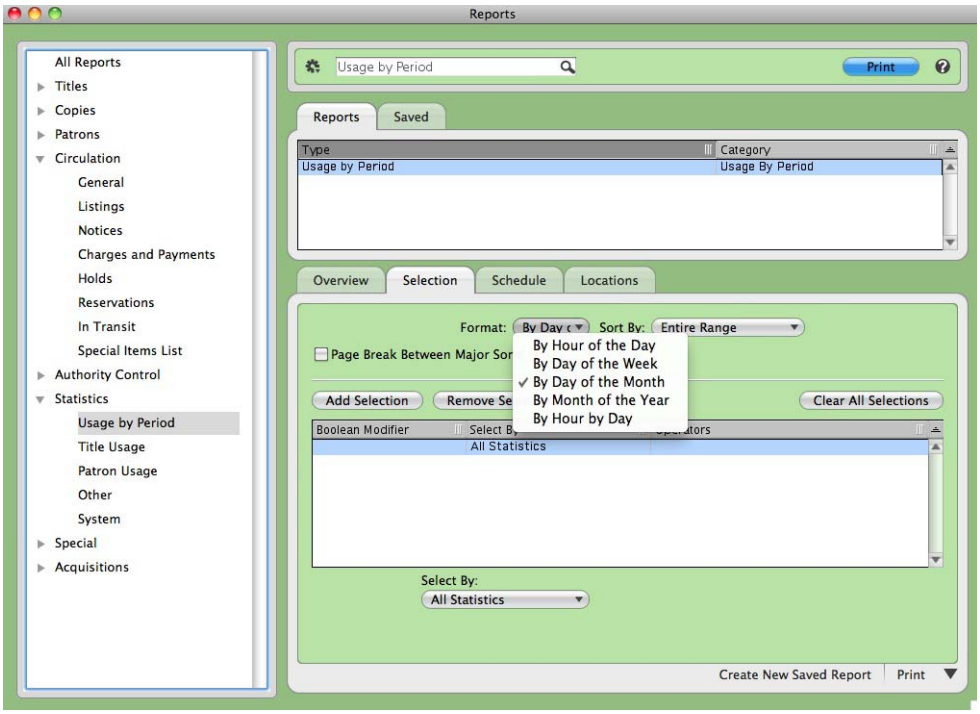
- Click on **Create New Saved Report** and click on **OK**.

## Overdue letters to Parents

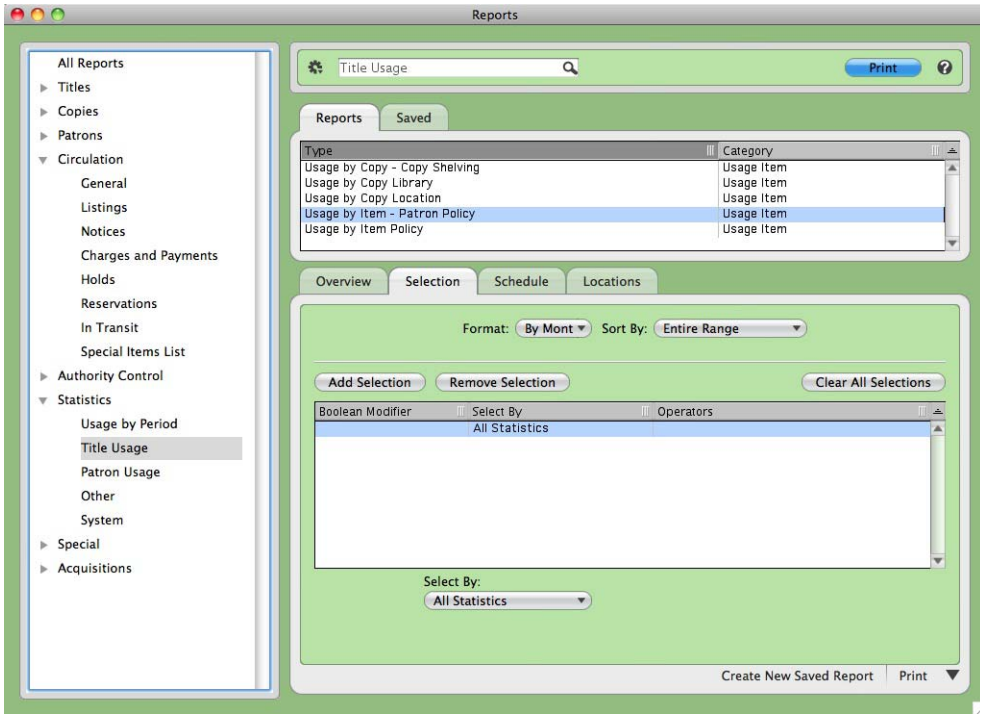


# E. Statistics Reports

## Usage by Period




## Usage by Item-Patron Policy



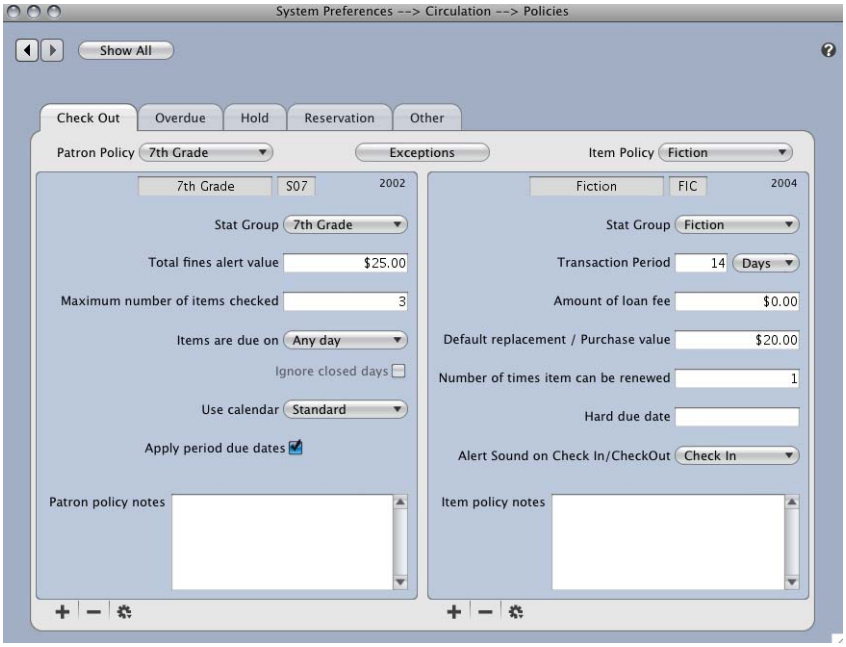
## NOTES

# 9 Policies and Preferences

To access policies and preferences, choose **Preferences** from the **Edit** drop-down menu.

## A. Site Information, Email, Security, Operators.

## B. Policies (Patrons, Items, Exceptions) and Call Number Policy Mapping




**1. Set up a Patron Policy for 6th grade students with a Policy Code of S06.**

To create a new policy:

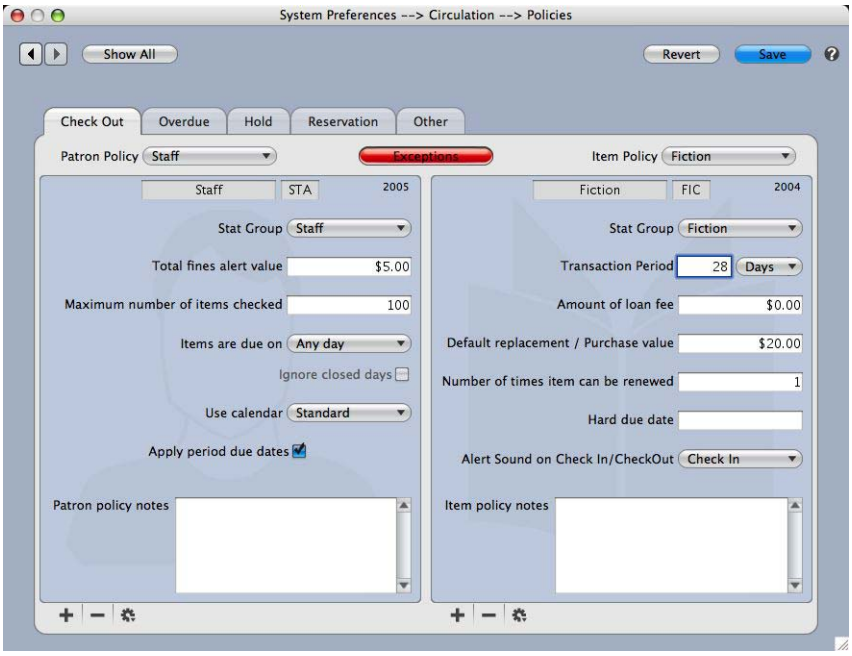
- Click on **Edit** on the menu bar and select **System Preferences**.
- In the **Circulations** category, click on **Policies**. A **Patron Policy** is in the left pane and an **Item Policy** is in the right pane. Use the drop-down menus at the top-left and top-right to change to a different policy for that pane.
- Click on the **Add** (+) icon at the bottom of the side to which you want to add a policy.
- In the window that opens (**Add Patron Policy** or **Add Item Policy**)

- Give the policy a **Policy Name** and a **Policy Short** code in the **Policy Name** field and the **Policy Short Code** field and click on **OK**.

- Work your way through each tab and the policy options on each tab making the selections you want.

- When finished, click on the **Save** button in the upper-right corner of the window.

**2. Give those persons on Staff policy a 28 days transaction period for items on Fiction policy, but limit them to only 4 items on that policy.**




To make exceptions to the policy for a particular policy:

- Click on **Edit** on the menu bar and select **System Preferences**.

- In the **Circulations** category, click on **Policies**. A **Patron Policy** is in the left pane and an **Item Policy** is in the right pane. Use the drop-down menus at the top-left and top-right to change to a different policy for that pane. Have the patron policy for which the exceptions will be made showing in the left pane and an item policy to which exceptions will be made for that patron policy group showing in the right pane. (i.e. Staff on **Patron Policy** side and Fiction on the **Item Policy** side).

- Click on the **Exceptions** button in the top-middle of the window. When it turns red, click on the tab(s) and then the field(s) where you want to make the exception(s) and fill in the new value.

- Click **Save** when finished with that patron-item policy combination. Then click on the **Exceptions** button which should then turn yellow. An **Alert** icon will appear on the tab where the exceptions have been made, but you will not be able to see the exception without having that tab in focus and clicking on the **Exceptions** button again. Then the field with the red outline will mean that that is where the exception is and the exceptions value is the one showing.

- Repeat on all patron-item policy combinations until you have made all the exceptions that you want.

To set call number mapping:

- Go to **Edit** on the menu bar and select **System Preferences**.

- Click on **Cataloging** in the **Management** category.

- Click on the **Policy Mapping** tab.

- Click on the **Add** (+) icon in the bottom-left corner of the window.

- Fill in the **Starting With** and **Ending With** fields with call numbers to represent the range of the call numbers to be assigned to a certain policy

- Fill in the **Library** if you are in a Central Union system.

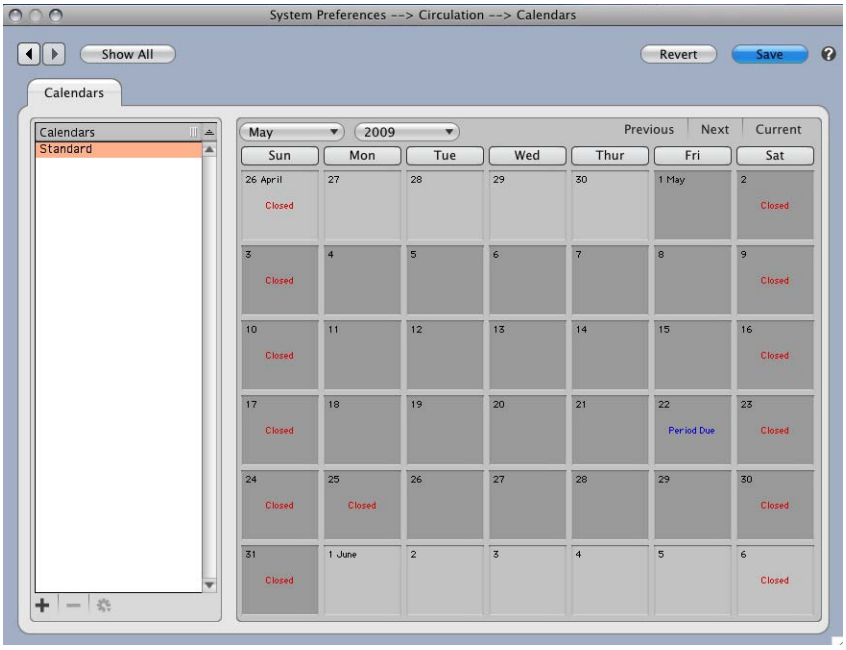
- Select the appropriate policy from the drop-down menu at the bottom of the window.

- Click on **Save** on the window.

- Repeat until you have set all call number mappings that you want to set.

- Click on **Save** on the **System Preferences** window.

## C. Calendars



1. **On the Standard Calendar, for next year, close every Saturday and Sunday for the entire year, Labor Day and all of July and August. Set a** Period Due Date **for the third Friday in May.**

   To set calendar closed days:

   - Go to **Edit** on the menu bar and select **System Preferences**.
   - In the **Circulation** category, click on **Calendars**.
   - If you have more than one calendar, select the correct one in the left pane.
   - To close the same day of the week for the whole year:
     - Change the **Month** drop-down menu to **January** and the **Year** drop-down menu to the desired year.
     - Holding down the **<Alt>** (Windows) or **<Alt/Option>** (Macintosh) key, click on the day label at the top of the calendar.
     - When asked if you want to close the day for the rest of the year, click on **Yes**.
   - To close consecutive days, **click, hold and drag** from the first date through the last date.
   - To close one day, **click once** on the desired date.
   - To set a **Period Due Date**, **click twice** on the date.
   - To clear a date, **click** through the cycle -- **once** closes the date, **second click** sets a **Period Due Date**, **third** click clears the date.
   - Click on **Save** in the upper-right corner of the window to save changes.

## D. Circulation Rules, Barcodes

## E. Patrons, Items

## F. Researcher

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## NOTES:

# 10 Alexandria Quick Start Checklist

For those who have not set up Alexandria, the following is an ordered checklist of what to do in the order you should do these things.

## A. Install Alexandria

## B. Import Items

## C. Utilities

### a. Set Archives Schedule

### b. Set Rebuild Schedule

## D. Set System Preferences

### a. Site Information

### b. Email

### c. Security

### d. Operators

### e. Calendars

### f. Policies (Patrons, Items, Exceptions) and Call Number Policy Mapping

### g. Circulation Rules, Barcodes

### h. Patrons, Grades, Items

### i. Researcher

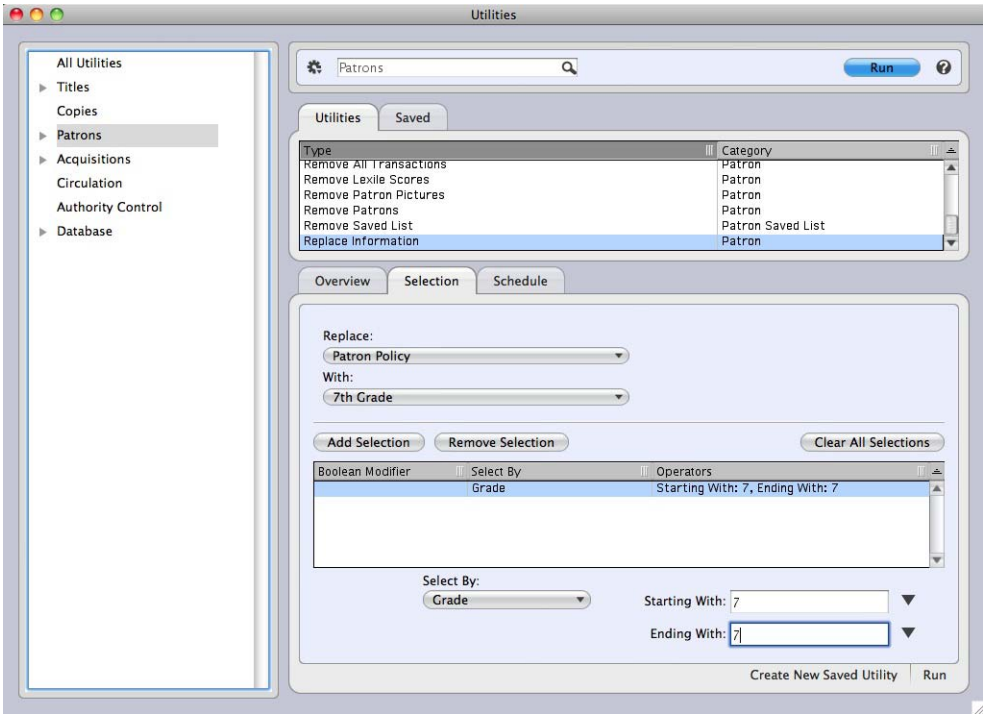
## E. Import Patrons

# F. Run Utilities

Remember, you must have your policies established before you can run the utility to change items or patrons to a different policy.

## a. Patron utility to put patrons on correct policies

To change patrons to a new policy:

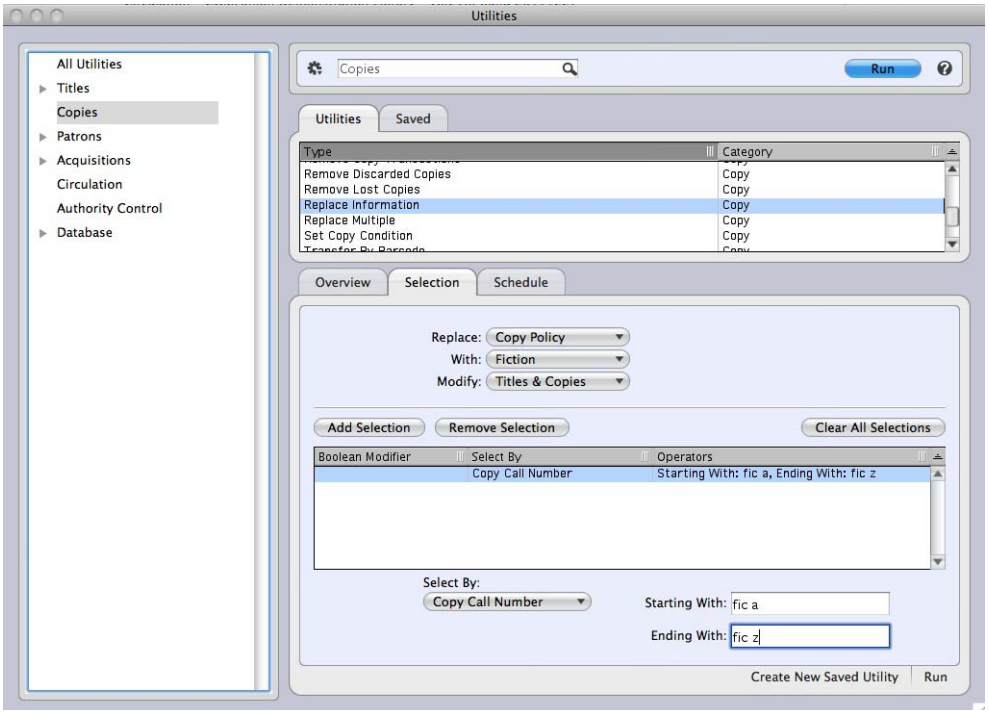



- Go to **Tools** on the menu bar and select **Utilities**.
- Click on **Patrons** in the left frame, then, click on **Replace Information** in the main (right) frame.
- Set the **Replace** drop-down menu to **Patron Policy**, the **With** drop-down menu to the policy you want used for the selected items. Leave the **Modify** drop-down menu set to **Titles and Copies**.
- Set **Select By** drop-down menu to the desired criteria and fill in the **Starting With** and **Ending With** fields with the appropriate information.
- Click **Run**.

NOTE: Remember, if you are asked whether or not you want to **Archive**, the answer is *always* **Yes**.

### b. Item utilities to put items on correct policies

To change items to a new policy:




- Go to **Tools** on the menu bar and select **Utilities**.
- Click on the **Copies** in the left frame, then, click on **Replace Information** in the main (right) frame.
- Set the **Replace** drop-down menu to **Copy Policy**, the **With** drop-down menu to the policy you want used for the selected items. Leave the **Modify** drop-down menu set to **Titles and Copies**.
- Set **Select By** drop-down menu to the desired criteria and fill in the **Starting With** and **Ending With** fields with the appropriate information.
- Click **Run**.

NOTE: Remember, if you are asked whether or not you want to **Archive**, the answer is *always* **Yes**.

## G. Questions or Problems? — Call Tech Support

Tech Support is available 24 hours a day, 7 days a week, 365 days a year.

Just call 1-800-347-4942.

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## NOTES: